Zetadocs for Microsoft Dynamics NAV
Installation Guide

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Contents

1. Introduction

Thank you for choosing Zetadocs for Microsoft Dynamics NAV. The aim of this document is to guide you through the installation of Zetadocs for NAV. The document contains a brief overview of Zetadocs and then provides a step by step guide as to how to install Zetadocs for NAV. It is recommended that you read the installation guide before starting an installation.

1.1 Microsoft Dynamics NAV Compatibility

This product has been developed and tested against Microsoft Dynamics NAV version 4.0, 5.0 and 6.0. SP1

1.2 Installation Pack Contents

The software is supplied on a CD and contains the following:

Zetadocs NAV Server Components

Folder containing the updates for NAV and installation support files:
- NAV .fob files containing code/table/form/pages etc. objects to import into NAV

Zetadocs for NAV Client

Installs everything that is needed on the end user desktop:
- Zetadocs Client application with NAV extensions
- Zetadocs API runtime

Target OS: Windows Server 2008, Windows Server 2003, Windows 7, XP, Vista,

Zetadocs SharePoint Extensions

Contains:
- SharePoint Extensions installer

Target OS: Windows Server 2008, Windows Server 2003,
SharePoint 2007 MOSS and (WSS) v3.0 and SharePoint 2010 full and foundation.

Zetadocs Server

Contains:
- Zetadocs Server Installer

Target OS: Windows Server 2008, Windows Server 2003,

Documentation

- Documentation (installation, configuration and deployment instructions)
- Zetadocs for NAV help files

Supported Languages

- Dutch
- French
- English

Note: NAV objects available for NAV database language versions NA, NL, BE, W1 and GB.

1.3 Technical Specifications

This section details the minimum system requirements suitable for using Zetadocs for NAV.

Client Operating systems supported

- Windows 7 (32-bit and 64-bit)
- Windows Vista Business, Ultimate and Enterprise (32-bit and 64-bit)
- Windows XP Professional (32-bit)
- Windows Server 2008 R2 (64-bit)
- Windows Server 2008 R2 with Remote Desktop Services
- Windows Server 2008 Standard Edition (32-bit and 64-bit)
- Windows Server 2008 with Windows Terminal Services
- Windows Server 2008 with Citrix Presentation Server 4.5
- Windows Server 2003 Standard Edition (32-bit and 64-bit)
- Windows Server 2003 with Windows Terminal Services
- Windows Server 2003 with Citrix Presentation Server 4.5

- Requires Microsoft.NET Framework® version 2.0
- Integrates with Microsoft Office Outlook® 2003 SP2, Microsoft Office Outlook 2007 and Microsoft Office Outlook 2010
- Integrates with Lotus® Notes® V6.5 and above
- Integrates with SMTP email systems
- Active Directory® integration for rapid and easy deployment to all network users

Client Hardware requirements

It is recommended that systems have Pentium® class CPUs of 1 GHz or higher with 1GB RAM or more

PDF capabilities

- Create PDF files which are readable using Adobe® Reader® software version 5 and later
- Supports PDF attachments created in PDF 1.2, 1.3, 1.4 and 1.5 standards
- Specify PDF security options such as allow printing, content extraction and password protection
- Password protection using 40-bit and 128-bit encryption

Other software requirements

- Integrates with NAV version 4.0, version 5.0 and version 6.0 SP1 (x86 or running 32 bit on x64).
- Supports Microsoft Office SharePoint Server (MOSS) 2007 and Windows SharePoint Services (WSS) v3.0 (x86 or running 32 bit on x64).
- Supports Microsoft Office SharePoint 2010

Glossary of Terms

Term	Description
Document	Any printable document that can be printed to the Zetadocs printer. Typically refers to an NAV Report in this document.
Report	A NAV Report

2. Overview of Zetadocs for NAV

Zetadocs for NAV helps accounts departments streamline business processes, reduce the costs of handling paper documents and enhance customer service. It enables Microsoft Dynamics NAV users to create and deliver statements, invoices, remittances and other financial documents instantly from their PC. Zetadocs archives documents to Microsoft SharePoint so they can be retrieved promptly, enabling users to respond to queries instantly.

Zetadocs for NAV enhances document workflows in NAV in 3 main areas:

2.1 Document Delivery

Producing, packaging and posting statements, invoices and remittances is a time consuming and costly process. Zetadocs for NAV enables users to deliver accounting documents instantly by email or fax, removing the cost of printing and postage and reducing the time accounts staff spend on administrative tasks. Simple rules can be set up to deliver business documents appropriately by email and fax, as well as being printed, so that customers can have the choice of how they receive information. Zetadocs for NAV makes it straightforward for users to create and send NAV documents singly or in batches.

2.2 Document Archiving and Retrieval

Zetadocs for NAV automatically archives copies of all documents that have been sent, allowing for quick retrieval. Accounts staff will no longer waste time searching for paper documents and storage costs will be reduced, helping companies to meet compliance guidelines. Zetadocs for NAV archives to SharePoint so that non NAV users such as sales people can access key documents easily, without relying on assistance from the accounts team.

2.3 Document Capture

Zetadocs for NAV manages the capture and storage of paper and electronic documents that are entered on NAV. For example, it can store copies of inbound sales orders electronically, whether they are received on paper, by fax or by email. This reduces the risk of incoming documents being lost or misfiled. If you choose to install the Zetadocs Server it will automatically convert compatible documents into pdf in preparation for storage in SharePoint. Capture can also provide a range of other features such as Optical Character Recognition (OCR), Barcode recognition and Document Queues.

2.4 How Zetadocs Delivers Documents from NAV

When printing a report that has been setup for Zetadocs, a Sales Order report for example, the report runs as usual. After selecting the desired records and selecting print, Zetadocs analyses each record in turn against the Zetadocs Rules. These rules will be covered in more depth later in the system configuration section 10.6 but basically a rule is a collection of specific settings which are applied when sending a document with specific properties. These include details such as the recipient, delivery method (Email, Fax, Hard Copy), Archiving settings and the Zetadocs Template to apply.

Zetadocs for NAV rules come in four levels which allow you to automate your document delivery, on printing a document to Zetadocs the rules are applied in descending order until one matches the situation.

Using rules it is possible to be highly specific about the way documents are handled allowing a great deal of automation of the delivery process.

Rules Levels:

1. The Default Rule – a basic rule that can be used by any Zetadocs enabled report.
2. Per Document Set – specific settings for Zetadocs enabled documents by type.
3. Per Company – specific settings for Zetadocs enabled documents by company.
4. Per Company, per Document Set – specific settings applied to specific document types when sent to a specific company.

Rule levels are much easier to understand by looking at an example. The diagram in Figure 1 demonstrates the delivery process which should help you trace the document delivery process as we work through the example.

Our NAV user needs to send out three Sales Orders to different customers called Sample Company 1, 2 and 3. In an effort to cut down on delivery costs the standard way of sending documents (default level 1 rule) is to send using email and SharePoint archiving is on, the standard way of sending Sales Orders is via Email using the Sales Order Template (Lv2 rule per document set). There are numerous other settings available when creating rules but we will focus on delivery method to keep this example simple.

Record 1	Sales Order 33659
Company	Sample Company 1
Rule Setup	No specific company rules (Lv3 and Lv4 rules).

Record 2	Sales order 33660
Company	Sample Company 2
Rule Setup	This company likes to receive all correspondence via Fax (Lv3 per Company Rule).

Record 3	Sales Order 33661
Company	Sample Company 3
Rule Setup	This company likes to receive most correspondence via fax however they are happy to receive Sales Orders via email (Lv3 and Lv4 rules).

On selecting Print in the Sales Order card they are asked to filter to the desired records, on pressing Print again each record in the print job will be processed in turn. On processing the Zetadocs rule settings are interrogated to determine the delivery information to associate with the record.

For our first record this would set delivery to email and the template to the Sales Order template. The details necessary to delivery and archive are attached as Embedded Commands.

The second record is then considered, the level 3 rule for this means that Fax is the chosen delivery method again the details necessary to delivery and archive are attached as Embedded Commands.

The final record has both level 3 and 4 rules, as level 4 rules override those below the document is set to be delivered by email. The records are then gathered together and sent as a single print job to the Zetadocs Client. Here the embedded commands are removed and analysed, the templates are applied and the email message body is created as shown below with values from NAV in red. This provides automated generation of personalised correspondence, with the delivery information also set the documents are ready to be delivered and archived.

Subject: Order Confirmation for order number: 33659 for Sample Company 1
Message Body:
FAO: John Smith
Dear Customer,
    I'm pleased to attach your order confirmation, reference number 33659.

Kind regards,

    Sales Team
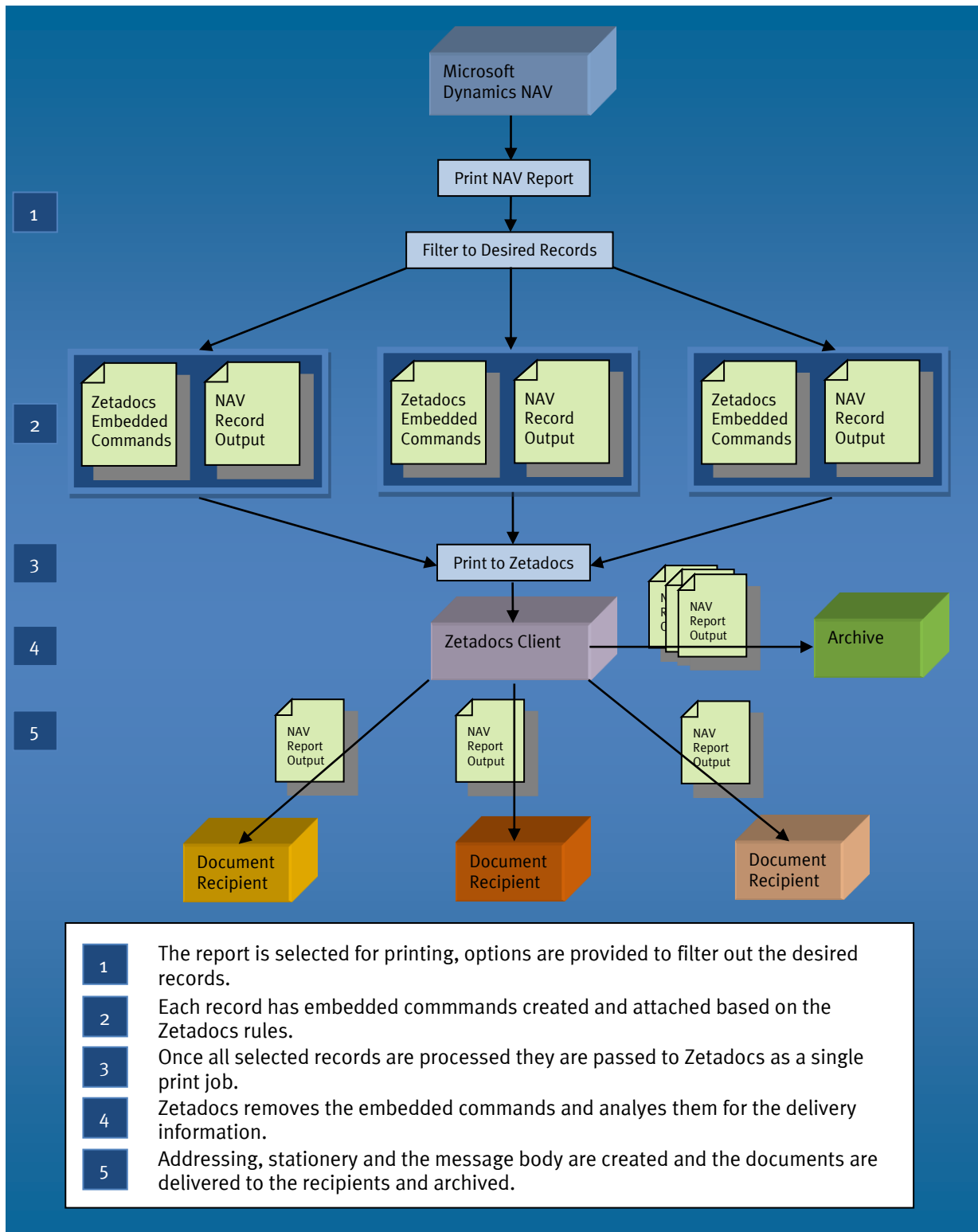
Figure 1 - Zetadocs for NAV Document Delivery Overview

The following describes the numbered items in the figure:

1. The report is selected for printing, options are provided to filter out the desired records.

2. Each record has embedded commmands created and attached based on the Zetadocs rules.

3. Once all selected records are processed they are passed to Zetadocs as a single print job.

4. Zetadocs removes the embedded commands and analyes them for the delivery information.

5. Addressing, stationery and the message body are created and the documents are delivered to the recipients and archived.

3. Assessing your Installation Requirements

We would recommend that before you begin your installation that you assess which of the various Zetadocs elements you are adding to your system. Zetadocs for NAV offers four main product offerings tailored to suit various needs.

3.1 Zetadocs Delivery Essentials

Provides the core functionality of Zetadocs for NAV, with delivery rules to automate document delivery and SharePoint archiving.

3.2 Zetadocs Capture Essentials

Capture essentials provides you with our drag and drop capture facility, this means that documents and emails can be dragged into the specifically created areas in our Zetadocs for NAV modified forms within the NAV Role Tailored Client. These are then added to your archive.

3.3 Zetadocs Delivery Plus

Note: Can only be installed by Advanced Solution Partners

Delivery Plus provides a whole host of customisation options for Zetadocs. It is designed for use by NAV VARs and systems integrators with experience in programming within NAV, but can also be used by Equisys to fulfil bespoke requirements for individual systems. For full details on what can be achieved and suitability for your requirements please contact Equisys technical support.

3.4 Zetadocs Capture Plus

Note: Can only be installed by Advanced Solution Partners

Zetadocs Capture Plus provides document capture for on screen reference and approval, providing a complete transactional document management system for Microsoft Dynamics that is based upon Microsoft SharePoint. It contains a wide range of features for customising the behaviour of the Capture functionality in a Zetadocs for NAV system. It is designed for use by NAV VARs and systems integrators with experience in programming within NAV, but can also be used by Equisys to fulfil bespoke requirements for individual systems.

Features Include:

- Capture and conversion of inbound documents to PDF/A format
- Custom Document Queues
- Optical Character Recognition
- Barcode Recognition
- On screen approval with workflows
- Document Association

For full details on what can be achieved and suitability for your requirements please contact Equisys technical support.

SharePoint Archiving and Integration (Included as Standard with all systems)

In a SharePoint enabled company, Zetadocs for NAV offers the ability to archive backup copies of correspondence in a highly customizable archive. It does this by storing metadata against the archived document that makes it easy to locate records or customer related documents, or to search based on your own criteria. If you are intending archive to SharePoint from Zetadocs for NAV we would recommend carrying out that part of this installation first before carrying on with the rest of the Zetadocs for NAV installation.

3.5 Identifying the Required Installation Elements

Zetadocs can aid your document handling in a variety of ways depending on the modules you are installing. Several of these modules share core components of Zetadocs with others and as such those installing Capture Essentials will be installing several components from throughout this guide. To aid you in locating those chapters relevant to your install simply look for the coloured indicators next to the chapter headings.

Delivery Chapters

Capture Essentials Chapters

Capture Plus Chapters

4. Installation Overview

The aim of this section is to provide you with an overview of the installation process. Shown next is an outline of the major steps involved when performing a full install using the standard configuration data. If you are installing a Capture Essentials System only then the process is largely the same as the components installed will depend on the selections from the our setup program. For example customers installing the Zetadocs Client as part of a Capture only install would install all components save Zetadocs PDF which is only required for Zetadocs Delivery.

Installation Overview

Server Install

1	Install Zetadocs SharePoint Extensions
2	Install Zetafax Server Module
3	Install Zetadocs for NAV Client
4	Install Zetadocs for NAV Connector
5	Configuring Zetadocs for NAV
6	Install Zetadocs Capture Features

Client Install

7	Install Zetadocs for NAV Client
8	Install Zetafax Client
9	Testing the Zetadocs for NAV Solution

Zetadocs for NAV Delivery shown in Blue boxes.
Zetadocs for NAV Capture shown in Red boxes.
Zetadocs for NAV Fax Add-on Module shown in Green boxes.

Figure 2 - Zetadocs Install Process

4.1 Starting your Product Installation

Zetadocs is fulfilled via either a product CD or a software download, to begin your install simply insert the CD into a suitable drive or extract the download to a suitable location. The Zetadocs Setup program will automatically run and appear. To begin your install simply select the module or combination of modules you are installing.

Figure 3 - Zetadocs Setup Program

This will display a list of the components relevant to your installation as shown in the figure below.
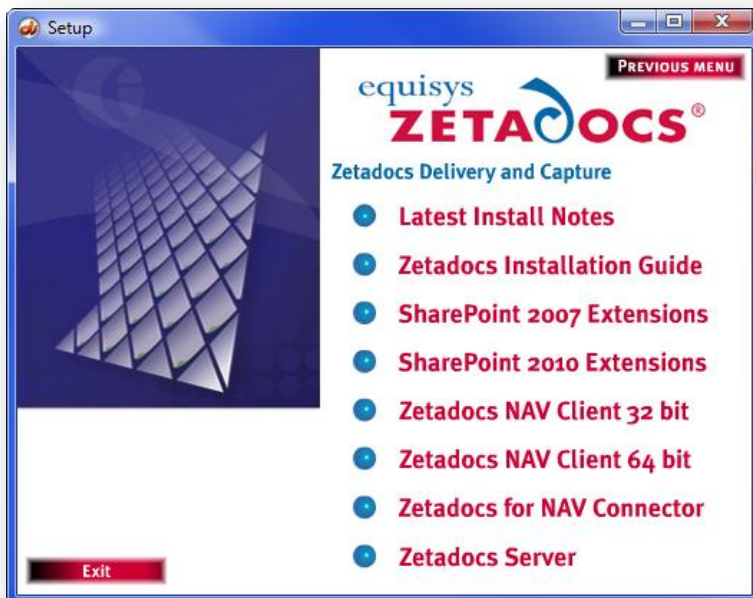
Figure 4 - Zetadocs Setup Program - Delivery and Capture Options

4.2 Installation steps to be performed on the server or servers

1. Installing the Zetadocs SharePoint Extensions (Optional)

   - Creation of the Zetadocs Archive Document library and installation of the Zetadocs for NAV search web parts, including user access control.

2. Installing the Zetafax Server Engine (Requires the Zetafax Upgrade Module)

   - Installation and configuration procedure of the fax engine, including licensing and registration, enabling users and setting up fax devices.

3. Installing the Zetadocs for NAV Client

   - Installation and configuration procedure for the Zetadocs for NAV client, including licensing and registration, enabling users and setting up shared folders.

4. Importing the Zetadocs for NAV Connector

   - Installation of the Zetadocs for NAV granules within Microsoft Dynamics NAV. Using the NAV Pane Designer to configure them, including setting up the Zetadocs for NAV System tables and adding code to existing NAV objects.

5. Zetadocs for NAV Configuration

   - Importing the standard configuration data.

   - Adjusting standard data to fit in your requirements.

6. Installing Zetadocs Capture Essentials/Advanced (requires additional licence)

   - Essentials: Installs the drag and drop document capture feature.

   - Advanced: Installs the Zetadocs Server which converts documents placed in the document queue folders into pdf format. Configuration of other Capture Plus features as required.

4.3 Installation steps to be performed on each client machine

7. Installing the Zetadocs for NAV Client

   - Installing the Zetadocs for NAV Client Installation and configuration procedure for the Zetadocs for NAV client, including licensing and registration, enabling users and setting up shared folders.

8. Installing the Zetafax Client (optional requires the purchase of the additional Zetafax module)

9. Testing the Zetadocs for NAV Solution

   - Verify the functionality end to end and gain customer acceptance.

Note: Those intending to install using Group Policy should first perform the server setup as usual before viewing the instructions in section 27.5 to roll the system out across the subsequent client machines.

5. Zetadocs SharePoint Extensions

The Zetadocs SharePoint Extensions installer provides a set of components that sit on a Windows SharePoint machine, these components comprise web services, web parts and ASPX pages. The purpose of these components is to provide a means of integrating Zetadocs for Microsoft Dynamics products with a SharePoint installation.

SharePoint Requirements

The Zetadocs SharePoint Extensions installer will only install successfully on a machine that is running the following versions of SharePoint.

- Windows SharePoint Services 3.0 (WSS)
- Microsoft Office SharePoint Server (MOSS) 2007
- Windows SharePoint Foundation 2010
- Microsoft SharePoint 2010

Those installing on SharePoint 2010 should proceed to section 5.8 for installation details.

5.1 Installation of the Extensions with SharePoint 2007

Before running the installer, you must be logged onto the machine using an account that has SharePoint Site Collection Administrator privileges for the front-end web application and the Central Administration program. This account should be used for all rollout and configuration steps on the SharePoint machine.

To check which accounts are listed as Site Collection Administrators, you should do the following:

- On the SharePoint machine, run the application **SharePoint 3.0 Central Administration** from the Start menu.
- Click on the **Application Management** option in the left-hand navigation panel.
- Select the **Site Collection Administrators** option from the SharePoint Site Management section of the page. The resulting page will show you which accounts are listed as the Primary and Secondary Site Collection Administration accounts.

Figure 5 - SharePoint Site Collection Administrators

- Select the Site Collection drop-down at the top of this dialog and choose **Change Site Collection.**
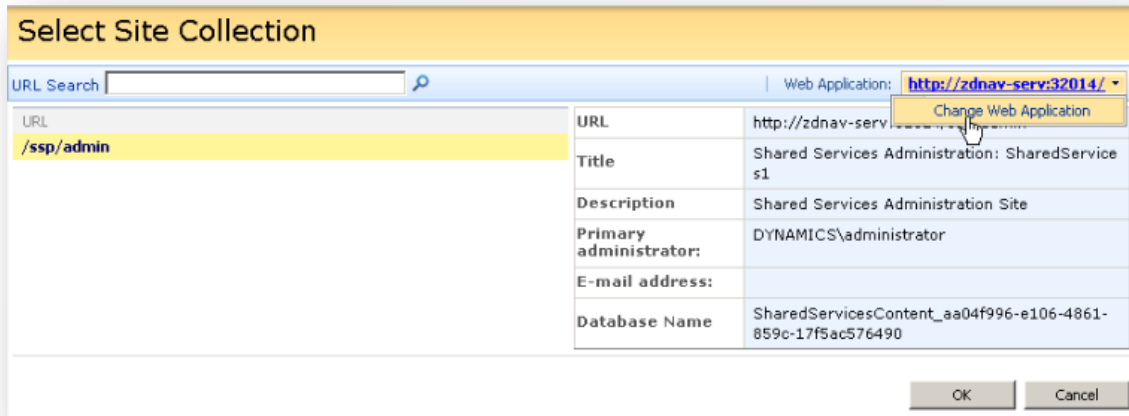
Figure 6 - SharePoint Site Collection

- Select the web Application drop-down at the top of this dialog and choose **Change Web Application.**
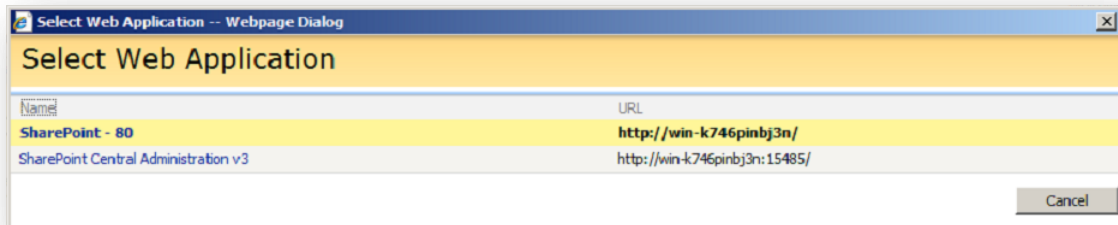
Figure 7 - SharePoint Site Web Application

- Add your chosen Administrator account to both the **Central Administration** and **front-end Web Applications**. The front end web application can be identified as it uses the root URL for your SharePoint site and often uses port 80.

5.2 Installing Zetadocs SharePoint Extensions

To install the Zetadocs SharePoint Extensions, you should do the following:
- Run the Zetadocs for Microsoft Dynamics product CD or download file, the CD will auto-run and the download should be extracted to a suitable location.
- The Zetadocs installer window should appear asking you to select the type of install you are doing.
- Choose the relevant option e.g. Zetadocs Delivery, and you will be directed to the install options window.
- Choose the **SharePoint Extensions** option relevant to your version of SharePoint (2007/2010).

Work through the installation wizard setting the destination install folder as appropriate until the following dialog is displayed:

Figure 8 – Zetadocs SharePoint Extensions Installer

You have three installation options to choose from:

Make available (activate) for all SharePoint sites (recommended)
Choosing this option will install, deploy and activate all the files required for the Zetadocs SharePoint Extensions. This includes the Zetadocs Web Services, Advanced Search web part and search pages. When choosing this option, no further manual steps are required to roll out the Zetadocs SharePoint Extensions.

Deploy only, to allow later activation by an administrator
This option will install all required files onto the SharePoint machine and then deploy the Zetadocs SharePoint Extensions within SharePoint. This will make the features available for activation on all SharePoint web applications (sites). The activation operation must then be performed manually by a site administrator (see below for further details).

Install solution files only
This is the basic install option. Choosing this option will install all required files onto the SharePoint machine. The SharePoint administrator must then deploy the features and activate them on the SharePoint web applications (sites). See below for further details.

You will then be asked to select the Dynamics product you are operating:

- Select the product you are using.
- Click **Next** to continue.

Figure 9 – Selecting the Dynamics product

The following dialog is now displayed:

Figure 10 – SharePoint Web Address Configuration

You should enter the web address (URL) of your top-level SharePoint site into the box provided. To obtain this, open your SharePoint home page in Internet Explorer and note the URL in the address bar. The table below lists some examples of what you should enter in the above dialog.

URL in Internet Explorer address bar	What to enter in the installer
http://intranet/Sales/default.aspx	http://intranet/
http://sharepoint-server:1492/Sales/default.aspx	http://sharepoint-server:1492/
http://sharepoint-server/Sales/International/	http://sharepoint-server/

On adding the site web address and selecting Next you will be asked if you wish to start the installation, click Install. A warning message will appear asking whether you wish to create Content Types and columns within SharePoint. If you have already specified your Zetadocs Content Types and columns select No as you should not create these again otherwise select Yes to continue the installation.

Once the install completes, and if you chose the installer recommended option of *'Make available (activate) for all SharePoint sites (recommended)',* the software is now ready to use. Please see the Checklist section later for details of how to test that everything is installed correctly and then continue from there to set up your SharePoint Document Library.

If you selected either of the other two installer options, please follow the advice in the following section first.

5.3   Deploying and Activating in SharePoint

In choosing either the *'Deploy only, to allow later activation by an administrator'* or *'Install solution files only'* options in the installer, you have elected to perform some manual steps in order to complete the installation of the Zetadocs SharePoint Extensions.

I chose the 'Install solution files only' option

If you chose to just install the Zetadocs SharePoint solution files, you need to deploy and then activate the software. To do this, you should do the following:

- On the SharePoint machine, run the application **SharePoint 3.0 Central Administration** from the Start menu.
- Click on the **Operations** option in the left-hand navigation panel.
- Select the **Solution Management** option from the Global Configuration section on the displayed page.

Note: There are SharePoint solutions listed: Zetadocsmossextensions.wsp or Zetadocswssextensions.wsp (depending on your SharePoint installation type), Zetadocswebservices.wsp (common across both WSS and MOSS) and either zetadocsgpcts.wsp or zetadocsnavcts.wsp depending on your Dynamics product. Each of these needs to be deployed using the following steps:

For each of these solutions, you should do the following:
- Click on the filename.
- Choose the **Deploy Solution** option on the resulting page, as shown in the diagram below:
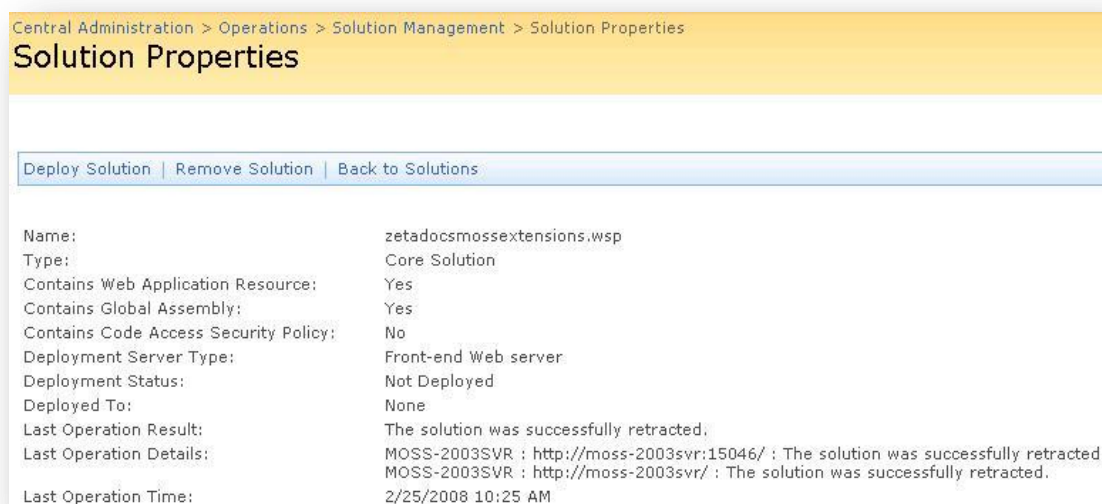
Figure 11 – SharePoint Solution Properties

- On the Deploy Solution screen that is now displayed, choose when you want to deploy the solution. For each solution, we recommend that you accept the default options.

The software is now deployed. To activate the features, please follow the advice in the next section.

I chose the 'Deploy only, to allow later activation by an administrator' option
To activate the Zetadocs Web Services feature and NAV content types on the SharePoint sites, you should do the following:

- Open your top-level site in Internet Explorer.
- Choose **Site Settings → Modify All Site Settings** from the Site Actions menu if running MOSS 2007, or Site Settings from the Site Actions menu if running WSS v3.0. *Please note that if the Modify All Site Settings option is not available on a MOSS 2007 machine, you may be logged on as a user with insufficient permissions to activate SharePoint features.*
- Select the **Site Collection Features** option from the Site Collection Administration section.
- Find the **Zetadocs SharePoint Web Services** feature in the list and **Zetadocs Content Types** (NAV) then click the **Activate** button for each.

To activate the Zetadocs Extensions feature on each site (including the top-level and Search sites), you should do the following:

- Open the site in Internet Explorer.
- Choose **Site Settings → Modify All Site Settings** from the Site Actions menu if running MOSS 2007, or Site Settings from the Site Actions menu if running WSS v3.0.
- Select the **Site Features** option from the Site Administration section.
- Find the **Zetadocs SharePoint Extensions** feature in the list, and click the **Activate** button.

The software is now activated, and you are ready to check that the operations have been successful. To do this, please review the Checklist below.

Checklist SharePoint 2007

Operation	Expected Result
On each site that you activated the Zetadocs SharePoint Extensions, browse to the following web address (URL): http://<sharepoint_url>/<site_name>/Pages/**ZetadocsSearch.aspx**	The Zetadocs Advanced Search page is displayed.

Operation	Expected Result
On each site that you activated the Zetadocs SharePoint Extensions, browse to the following web address (URL): http://<sharepoint_url>/<site_name>/Pages/**ZetadocsSearchResults. aspx**	The Zetadocs Search Results page is displayed.
If you have a Search Center site (MOSS 2007): Open the main search page (the one that displays the All Sites and People search tabs).	A **Zetadocs** search tab is visible. Clicking this tab opens the Zetadocs Advanced Search page.
Checking the Site Columns and Content Types: Navigate to the root site, i.e. the web address that you entered at install time. Select **Site Actions →Site Settings → Modify All Site Settings** from the Site Actions menu if running MOSS 2007, or Site Settings from the Site Actions menu if running WSS (v3.0). Select **Site Columns** under the Galleries section. Check the Site Columns are as expected and then repeat selecting Site Content types from the galleries section.	Columns to include: NAV Record No. NAV Company No. Zetadocs Archive ID Recipient Name Organization

Configuring SharePoint Archive

In order to use the Zetadocs SharePoint Extensions, you will need to create and configure a Document Library for storing your archived documents. Please review the following advice on how to do this. This information should be read in conjunction with the SharePoint general help files as appropriate. It is possible to create document libraries for both Sales and Purchase documents, if you wish to keep these separate simply do the instructions in this section for each giving them distinct names.

- Browse to the site that you want to create the Document Library on e.g. http://intranet/docs.
- Select Create from the Site Actions menu.
- Select the Document Library option from the Libraries section on the displayed page.
- Give your Document Library a suitable name like **Archive.**

Note: This is the naming used in the standard configuration data, if you wish to use another name you will need to adjust the Archive library setting on the Zetadocs System Rule Card.

- Next add a suitable description, etc. and leave the Document Template as the default option.
- Do not turn on version control for the Document Library – versioned document libraries are not supported in the current version of the software.
- Click **Create** when finished.

You should now configure the permissions for the document library.

Configuring the document library permissions

- Browse to the Document Library through your SharePoint/IE browser.
- Select **Document Library Settings** from the Settings menu.
- Select the **Permissions for this Document Library** option from the Permissions and Management section.
- Ensure that all users who will be archiving/uploading document to this library have at least **Contribute access permissions**.
- If required, select **Edit Permissions** from the Actions menu to modify these settings for the relevant Users/Groups.

5.4   Enabling Search

At this point, the Zetadocs Advanced Search functionality will not work. This is because SharePoint has not been given the opportunity to create Mapped Properties for the custom fields that the Zetadocs Advanced Search relies on.

To enable the search functionality, please perform the following steps:

Associate the Zetadocs Content Type with your document library

- Browse to your created Document Library.

- Select **Document Library Settings** from the Settings pull-down menu.
- Click on **Advanced Settings** from the General Settings Menu.
- Change Allow management of content types to **Yes** and click **OK**.
- From the Content Types section, select the **Add from existing site content types** option.
- Add the **Zetadocs** content type and click **OK**.
- Select the Change new button order and default content type.
- Make the Zetadocs content type the default for the document library by giving it a **Position from Top** value of **1** and click **OK**.

Upload a document
- Browse to your created Document Library.
- From the Upload menu, select the **Upload Document** option, browse to a document you can upload as a test file and click **OK**.
- You will be shown a screen where you can edit the properties for the uploaded document.
- Ensure that **Zetadocs** is the selected content type and enter some test data for **EACH** field. Then click **OK**.

Perform a full crawl on MOSS systems
- Bring up a command prompt.
- Type **IISRESET** and press enter and wait for the system to stop and restart the internet services.
- Perform a full crawl of your SharePoint database. The steps required to do this are as follows:
- Launch the SharePoint Central Administration Utility.
- Click on **SharedServices1** on the left-hand menu.
- Select **Search Settings** from the Search section.
- Select Content Sources and Crawl Schedules.
- Select **Start Full Crawl** from the Local SharePoint Server sites pull-down menu.
- Wait until the full crawl is complete.

Performing a full crawl on WSS systems
- Bring up a command prompt.
- Type cd c:\Program Files\Common Files\Microsoft Shared\web server extensions\12\BIN and press return.
- Next enter **stsadm –o spsearch** and press return.
- Then enter stsadm –o spsearch –action fullcrawlstart
- Wait until the crawl is complete.

Testing the document library
It is recommended that you check that the process has been completed successfully. Please note that this step can be performed at any point before you begin using your Zetadocs system, but requires the completion of the remaining Zetadocs installation steps. At the end of the installation you will be prompted to do the following to ensure the document library works as expected.

- Archive a single document from NAV or GP into your chosen document library.
- Ensure that the document exists in the document library.

5.5   Modifying the Zetadocs Advanced Search web part (MOSS only)
The Zetadocs Advanced Search web part is not required for SharePoint 2010 users as its functionality is included as standard. From within Microsoft Dynamics NAV you can display the document archive history for a specified customer. To enable this functionality, it is necessary to modify the Zetadocs Advanced Search web part on each SharePoint site (including the top-level site and your Search Center). The procedure for doing this is detailed below.

- Browse to the Zetadocs Advanced Search page, e.g. **http://intranet/Pages/ZetadocsSearch.aspx** for the top-level site and http://intranet/<site_name>/Pages/ZetadocsSearch.aspx for the sub-sites.
- Click Site Actions → Edit Page.
- On the Zetadocs Advanced Search web part, click the **edit** box in the top right-hand corner and select **Modify Shared Web Part**.

- The Zetadocs Advanced Search configuration panel will appear to the right-hand side of your browser.
- Under Custom search fields, add a custom field where for a NAV system Property = **NAV Company No.** and Label = **NAV Company Number:**
- Click **OK**.
- Click **Exit Edit Mode** in the top right-hand area of the screen.
- You may be asked to save your changes, click **OK** to continue.

The site search feature will only operate after you have successfully archived a document.

5.6   Installing the Adobe PDF IFilter on a 32-bit system

The Ifilter is required to make PDF files indexable and therefore text searchable as well as being required for the correct formatting of search results.

- On 32-bit systems, download the Adobe PDF IFilter or the latest version of Adobe Acrobat Reader.
- Stop the IIS Admin service: Start → Run → services.msc → IIS Admin Service → Stop.
- Double-click the installer executable to start the installation (ensuring that you are logged onto the machine as a domain and SharePoint administrator).
- Run through the Install Wizard - accepting the defaults for each screen.
- Perform an IISRESET: **Start → Run → IISRESET**

Assigning a specific icon for your pdf files in SharePoint (Optional)

Should you wish to assign a recognisable icon to the pdf files in your archive it is possible to have any suitable image represent your content. If you do not wish to add a specific icon simply skip the steps below and continue with the additional steps relevant to your SharePoint version.

- Firstly you need to locate a suitable icon to represent pdf files in your SharePoint system.
- Copy this icon file to C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\12\Template\Images
- Go to C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\12\Template\XML and open the Docicon.xml file in a text editor such as Notepad.exe.
- Adjust the file to include the .pdf extension by adding **<Mapping Key="pdf" Value="<your image file name with extension>"/>** and saving the file.

Additional steps required on MOSS Systems

These next steps are relevant to MOSS systems only, if you are using WSS please proceed to the next step.

- Launch the SharePoint Central Administration program.
- Navigate to the **Shared Services** Administration for your site (often SharedServices1) →**Search Settings** →**File Types**
- Click New File Type.
- Enter **pdf** in the File Extension text box and click **OK**.
- Perform a Search Service stop: **Start** →**Run** →**net stop spsearch**
- Perform a Search Service start: **Start** →**Run** →**net start spsearch**

Additional steps required on WSS systems

On WSS systems you will also have to carry out the following steps.

- Click **Start → Run → REGEDIT** and then locate the following registry subkey:
- WSS Systems
- HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Shared Tools\Web Server Extensions\12.0\Search\Applications\<GUID>\Gather\Search\Extensions\ExtensionList
- Select Edit → New → String Value
- Assign the name **38** to the new string.
- Give it the value **pdf**
- Perform a Search Service stop: **Start → Run → net stop spsearch**
- Perform a Search Service start: **Start → Run → net start spsearch**
- Recrawl the site as per the crawl instructions in section 5.4.

5.7   Installing the Adobe PDF IFilter on a 64-bit system

For 64-bit systems please refer to the following advice:

http://www.adobe.com/support/downloads/detail.jsp?ftpID=4025

5.8   Installation of the Extensions with SharePoint 2010

Preparing SharePoint for Installation of the Extensions with SharePoint 2010

Before running the installer, you must be logged onto the machine using an account that has SharePoint Site Collection Administrator privileges for the front-end web application and the Central Administration program. This account should be used for all rollout and configuration steps on the SharePoint machine.

To check which accounts are listed as Site Collection Administrators, you should do the following:
- On the SharePoint machine, run the application **Central Administration** from the Start menu.
- Click on the **Application Management** option in the left-hand navigation panel.
- Select the **Change Site Collection Administrators** option from the Site Collections section of the page. The resulting page will show you which accounts are listed as the Primary and Secondary Site Collection Administration accounts.
- Select the Site Collection drop-down at the top of this dialog and choose **Change Site Collection.**
- Select the web Application drop-down at the top of this dialog and choose **Change Web Application.**
- Add your chosen Administrator account to both the **Central Administration** and **front-end Web Applications**. The front end web application can be identified as it uses the root URL for your SharePoint site and often uses port 80.

5.9   Installing Zetadocs SharePoint Extensions

To install the Zetadocs SharePoint Extensions, you should do the following:
- Run the Zetadocs for Microsoft Dynamics product CD or download file, the CD will auto-run and the download should be extracted to a suitable location.
- The Zetadocs installer window should appear asking you to select the type of install you are doing.
- Choose the relevant option e.g. Zetadocs Delivery, and you will be directed to the install options window.
- Choose the **SharePoint Extensions** option relevant to your version of SharePoint (2007/2010).

Work through the installation wizard setting the destination install folder as appropriate until the following dialog is displayed:

Figure 12 – Zetadocs SharePoint Extensions Installer

You have three installation options to choose from:

Make available (activate) for all SharePoint sites (recommended)
Choosing this option will install, deploy and activate all the files required for the Zetadocs SharePoint Extensions. This includes the Zetadocs Web Services, Advanced Search web part and search pages. When choosing this option, no further manual steps are required to roll out the Zetadocs SharePoint Extensions.

Deploy only, to allow later activation by an administrator
This option will install all required files onto the SharePoint machine and then deploy the Zetadocs SharePoint Extensions within SharePoint. This will make the features available for activation on all SharePoint web applications (sites). The activation operation must then be performed manually by a site administrator (see below for further details).

Install solution files only
This is the basic install option. Choosing this option will install all required files onto the SharePoint machine. The SharePoint administrator must then deploy the features and activate them on the SharePoint web applications (sites). See below for further details.

You will then be asked to select the Dynamics product you are operating:

- Select the product you are using.
- Click **Next** to continue.

Figure 13 – Selecting the Dynamics product

The following dialog is now displayed:

Figure 14 – SharePoint Web Address Configuration

You should enter the web address (URL) of your top-level SharePoint site into the box provided. To obtain this, open your SharePoint home page in Internet Explorer and note the URL in the address bar. The table below lists some examples of what you should enter in the above dialog.

URL in Internet Explorer address bar	What to enter in the installer

http://intranet/Sales/default.aspx	http://intranet/
http://sharepoint-server:1492/Sales/default.aspx	http://sharepoint-server:1492/
http://sharepoint-server/Sales/International/	http://sharepoint-server/

On adding the site web address and selecting Next you will be asked if you wish to start the installation, click Install. A warning message will appear asking whether you wish to create Content Types and columns within SharePoint. If you have already specified your Zetadocs Content Types and columns select No as you should not create these again otherwise select Yes to continue the installation.

Once the install completes, and if you chose the installer recommended option of *'Make available (activate) for all SharePoint sites (recommended)',* the software is now ready to use. Please see the Checklist section later for details of how to test that everything is installed correctly and then continue from there to set up your SharePoint Document Library.

If you selected either of the other two installer options, please follow the advice in the following section first.

5.10 Deploying and Activating in SharePoint 2010

In choosing either the *'Deploy only, to allow later activation by an administrator'* or *'Install solution files only'* options in the installer, you have elected to perform some manual steps in order to complete the installation of the Zetadocs SharePoint Extensions.

I chose the 'Install solution files only' option

If you chose to just install the Zetadocs SharePoint solution files, you need to deploy and then activate the software. To do this, you should do the following:

- On the SharePoint machine, run the application **Central Administration** from the Start menu.
- Click on the **System Settings** option in the left-hand navigation panel.
- Select the **Manage farm solutions** option from the Global Configuration section on the displayed page.

Note: There are SharePoint solutions listed: Zetadocsmossextensions.wsp or Zetadocswssextensions.wsp (depending on your SharePoint installation type), Zetadocswebservices.wsp (common across both WSS and MOSS) and zetadocsnavcts.wsp. Each of these needs to be deployed using the following steps:

For each of these solutions, you should do the following:
- Click on the filename.
- Choose the **Deploy Solution** option on the resulting page.
- On the Deploy Solution screen that is now displayed, choose when you want to deploy the solution. For each solution, we recommend that you accept the default options.
-

The software is now deployed. To activate the features, please follow the advice in the next section.

I chose the 'Deploy only, to allow later activation by an administrator' option

To activate the Zetadocs Web Services feature and NAV content types on the SharePoint sites, you should do the following:

- Open your top-level site in Internet Explorer.
- Choose the **Site Actions** menu and then **Site Settings**.
- Select the **Manage site features** option from the Site Actions section.
- Find the **Zetadocs SharePoint Web Services** feature in the list and **Zetadocs Content Types** (NAV) then click the **Activate** button for each.

To activate the Zetadocs Extensions feature on each site (including the top-level and Search sites), you should do the following:

- Open the site in Internet Explorer.
- Choose the **Site Actions** menu and then **Site Settings**.

- Select the **Manage site features** option from the Site Actions.
- Find the **Zetadocs SharePoint Extensions** feature in the list, and click the **Activate** button.

The software is now activated, and you are ready to check that the operations have been successful. To do this, please review the Checklist below.

Checklist SharePoint 2010

Operation	Expected Result
Checking the Site Columns and Content Types: Navigate to the root site, i.e. the web address that you entered at install time. Select **Site Actions →Site Settings** Select **Site Columns** under the Galleries section. Check the Site Columns are as expected and then repeat selecting Site Content types from the galleries section.	Columns to include: NAV Record No. NAV Company No. Zetadocs Archive ID Recipient Name Organization

Configuring SharePoint Archive

In order to use the Zetadocs SharePoint Extensions, you will need to create and configure a Document Library for storing your archived documents. Please review the following advice on how to do this. This information should be read in conjunction with the SharePoint general help files as appropriate. It is possible to create document libraries for both Sales and Purchase documents, if you wish to keep these separate simply do the instructions in this section for each giving them distinct names.

- Browse to the site that you want to create the Document Library on e.g. http://intranet/docs.
- Select the **Create** button.
- Select the Document Library option from the create page.
- Give your Document Library a suitable name like **Archive** in the right hand field.

Note: This is the naming used in the standard configuration data, if you wish to use another name you will need to adjust the Archive library setting on the Zetadocs System Rule Card.

- Select the **More Options** button and add a suitable description, etc. and leave the Document Template as the default option.
- Do not turn on version control for the Document Library – versioned document libraries are not supported in the current version of the software.
- Click **Create** when finished.

You should now configure the permissions for the document library.

Configuring the document library permissions

- Browse to the Document Library through your SharePoint/IE browser.
- Select the **Library** option from **Library Tools**.
- Select the **Library Permissions** option, located on right hand side in the settings section.
- Ensure that all users who will be archiving/uploading document to this library have at least **Contribute** access permissions.
- If required, select the user whose permissions you wish to edit by choosing its checkbox, select **Edit User Permissions** to modify these settings for the relevant Users/Groups.

Archived documents are stored in SharePoint as PDFs. To ensure that these are indexed correctly and that SharePoint recognizes them as 'Documents' in the search results, it is recommended that you install the Adobe PDF IFilter. The instructions for doing this are detailed later in section 5.11.

Testing the document library

It is recommended that you check that the process has been completed successfully. Please note that this step can be performed at any point before you begin using your Zetadocs system, but requires the completion of the remaining Zetadocs installation steps. At the end of the installation you will be prompted to do the following to ensure the document library works as expected.

- Archive a single document from NAV or GP into your chosen document library.
- Ensure that the document exists in the document library.

5.11   Installing the Adobe PDF IFilter on a 32-bit system

The Ifilter is required to make PDF files indexable and therefore text searchable as well as being required for the correct formatting of search results.

- On 32-bit systems, download the Adobe PDF IFilter or the latest version of Adobe Acrobat Reader.
- Stop the IIS Admin service: Start → Run → services.msc → IIS Admin Service → Stop.
- Double-click the installer executable to start the installation (ensuring that you are logged onto the machine as a domain and SharePoint administrator).
- Run through the Install Wizard - accepting the defaults for each screen.
- Perform an IISRESET: **Start → Run → IISRESET**

Assigning a specific icon for your pdf files in SharePoint (Optional)

Should you wish to assign a recognisable icon to the pdf files in your archive it is possible to have any suitable image represent your content. If you do not wish to add a specific icon simply skip the steps below and continue with the additional steps relevant to your SharePoint version.

- Firstly you need to locate a suitable icon to represent pdf files in your SharePoint system.
- Copy this icon file to C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\12\Template\Images
- Go to C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\12\Template\XML and open the Docicon.xml file in a text editor such as Notepad.exe.
- Adjust the file to include the .pdf extension by adding **<Mapping Key="pdf" Value="<your image file name with extension>"/>** and saving the file.

Additional steps required on SharePoint 2010 Systems

These next steps are relevant to SharePoint 2010 systems only, if you are using foundation please proceed to the next step.

- Launch the SharePoint Central Administration program.
- Click **General Application Settings** from the left-hand menu.
- Select **Farm Search Administration** from the Search section.
- Select the Search Service Application option.
- Select **File Types** from the Crawling section.
- Click New File Type.
- Enter **pdf** in the File Extension text box and click **OK**.
- Perform a Search Service stop: **Start → Run → net stop spsearch**
- Perform a Search Service start: **Start → Run → net start spsearch**

Additional steps required on foundation systems

On foundation systems you will also have to carry out the following steps.

- Click **Start → Run → REGEDIT** and then locate the following registry subkey:
- Foundation Systems
- HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Shared Tools\Web Server Extensions\14.0\Search\Applications\<GUID>\Gather\Search\Extensions\ExtensionList\
- Select Edit → New → String Value
- Assign the name **38** to the new string.
- Give it the value **pdf**
- Perform a Search Service stop: **Start → Run → net stop spsearch**
- Perform a Search Service start: **Start → Run → net start spsearch**

5.12   Installing the Adobe PDF IFilter on a 64-bit system

For 64-bit systems please refer to the following advice:

http://www.adobe.com/support/downloads/detail.jsp?ftpID=4025

6. Zetadocs NAV Client

This section describes the installation of client applications which includes the Zetadocs Client, the runtime API and the NAV Extensions. Zetadocs for NAV operates in conjunction with the Zetadocs Client version 4.1 or later and requires a Zetadocs Client "Automation" license to enable the batch document management features used by NAV.

Prerequisites

Before embarking on the install of the Zetadocs Client it is recommended that if you install the items listed below if you intend to make use of them.

- Install the Zetadocs SharePoint Extensions

6.1 Installing Zetadocs for NAV Client

Zetadocs for NAV needs to be installed onto the server as well as any intended client machines; the principle difference is the type of install selected from the installation dialog with server installations requiring either Administration or Custom installations. These options are clearly marked in the steps outlined below.

Note: If you are installing in a Terminal Services Environment please see the section 27.4 Installing in a Terminal Services Environment.

- Ensure the currently logged in user has local administration rights on the machine that is being installed upon.
  - o This is required to install pre-requisite components used in Zetadocs. These permissions can be elevated temporarily for the installation.
- Insert the Zetadocs for NAV CD or extract your product download.
- The Zetadocs setup program will autorun, choose the option pertinent to your install:
  - o Zetadocs Delivery
  - o Zetadocs Capture
  - o Zetadocs Delivery and Capture
- Select either the 32 or 64 bit link for the Zetadocs for NAV Client as required to begin the install.
- You will be asked to select the installation language.
- The installation program will open prepared to install the Zetadocs API Runtime which is a pre-requisite of the Zetadocs for NAV Client.
- Click Install to Install the Zetadocs API Runtime.
- The Zetadocs for NAV Client Installer will appear, select Next to begin the installation.
- The software licence agreement will appear, select accept once you have reviewed its contents.
- You will be asked to select the Install Type, this depends on the machine you are installing on with the **Typical** install generally being used for client machine setup. Administrator or Custom installs are generally done on the server as per your requirements.
  - o Typical
    - Is generally used for additional client users.
  - o Administrator
    - Installs all the Zetadocs NAV client feature components required including the product licensing and configuration application.
  - o Custom
    - Allows you to manually specify the install locations for Delivery and Capture components.
- Select **Next** and users performing a Zetadocs Delivery Installation will be asked to create a shared folder for their Templates. Note: Subfolders are not supported in the templates shared folder.
- Select the folder location and select **Next** to setup the network folder, you will be asked to click **Install** to begin the installation.

6.2 Install Zetadocs for NAV Help Files

Classic Client

The Zetadocs for NAV help files need to be copied to the Microsoft Dynamics NAV help folder on each machine and given names that will not clash with other help files. This folder may contain other help files

which may already use the 'a' post-fix name. In this case you should change the file names to an unused post-fix letter between a and j (e.g. change to addin_f.chm and addin_f.hh). Note that the post-fix on both file names must match.
There are 2 files:

- addin_a.chm
- addin_a.hh

They should be copied from:
> ***<CD Browser>\Zetadocs NAV Client\NAV Help***

For NAV 4.0 & 5.0 systems copy to:
> ***Program Files\Microsoft Dynamics NAV\CSIDE Client\ENG***
> Substitute ENG for the language pertinent to the install e.g. ENU for US systems.

For NAV 6.0 systems copy to:
> ***Program Files\Microsoft Dynamics NAV\60\Classic\ENG***
> Substitute ENG for the language pertinent to the install e.g. ENU for US systems.

Alternatively it can be copied to the equivalent installation folder of Microsoft Dynamics NAV on the machine.

Role Tailored Client

The Zetadocs for NAV help files need to be copied to the Microsoft Dynamics NAV help folder and given names that will not clash with other help files. There are 2 files:

- addin_a.chm

This should be copied from:
> ***<CD Browser>\Zetadocs NAV Client\NAV Help***

To:
> ***Program Files\Microsoft Dynamics NAV\60\RoleTailored Client\ENG***
> Substitute ENG for the language pertinent to the install e.g. ENU for US systems.

- addin_a.hh

This should be copied from:
> ***<CD Browser>\Zetadocs NAV Client\NAV Help***

To:
> ***Program Files\Microsoft Dynamics NAV\60\Service\ENG***
> Substitute ENG for the language pertinent to the install e.g. ENU for US systems.

You may need to restart the Microsoft Dynamics NAV server to get the help files to appear as expected.

- To do this got to **Start** and then click **Run,** in the **Open** box, type **services.msc,** and then press ENTER.
- Under Services, right-click **Microsoft Dynamics NAV Server**, and then click **Restart**.

6.3   Configuring Zetadocs Client Licensing

Before you can start using Zetadocs you must license and register it, enable users and setup file sharing folders for storage of company accessories (templates, stationery and attachments). The Zetadocs PDF configuration program is automatically installed as part of your Zetadocs system when you select the Administration install option during installation. This program allows you to manage your Zetadocs PDF program across your network, allowing licensing, registration, shared folders and user accounts to be modified.
Note: When installing on a client machine following a successful server installation you do not need to licence Zetadocs. Further the recommended Zetadocs install type for client setups is Typical which does not install the Zetadocs PDF Configuration program.

Zetadocs Client Licensing and Setup

- Launch the Zetadocs PDF Configuration.
- Choose the license location (General Tab).
  - o Active Directory (requires that user has access rights to write to AD)
  - o Shared Network Folder
- Enter your Zetadocs license number and company name and register online.
- Enter your registration key on receiving the registration success email.
- Add the required users.
- Set up a shared network folder for NAV Templates (Recommended that you select the location specified in the Zetadocs for NAV Client install earlier, it is required if you intend to use the NAV templates provided).
- Leave Network Archiving off if you are using SharePoint as an archive.

Zetadocs Client

- Start the client.
- If using Active Directory licensing, Zetadocs should locate the license automatically, otherwise, go to Tools→ Options\Licensing and enter the path to the network folder containing the Zetadocs license.
- Restart client if necessary.
- You can confirm that you are successful if the splash screen shows the Automation tag beside the number of users.
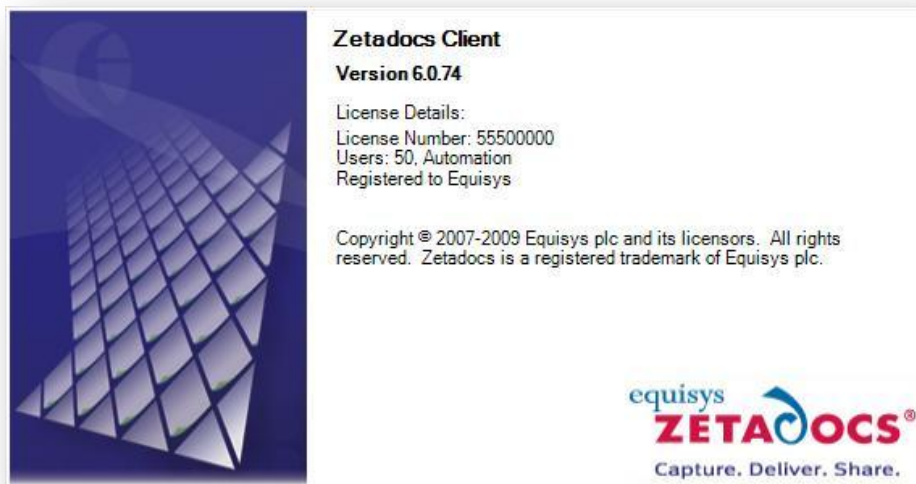

Figure 15 - Zetadocs Client Splash Screen

Please refer to the Zetadocs Client Help for further information on configuring the Zetadocs Client.

7. Zetadocs for NAV Connector

This section details how to install the Zetadocs for NAV Connector, the connector contains the elements which need to be imported into NAV to enable documents to be passed to the Zetadocs Client for delivery.

Pre-requisites:
- Zetadocs for NAV Client must be installed on the system where you intend to import the NAV objects.
- You have a NAV licence which allows the import of NAV objects
- Your NAV user login has sufficient permissions to insert data into all required tables (We recommend that you are using the NAV Administrator / SUPER user.
-

Installing the connector consists of:
- Importing of Zetadocs for NAV objects fob file
- Importing of Zetadocs for NAV tables fob file (optional)
- Importing of Zetadocs for NAV forms fob file (optional)
- Importing the Standard Configuration Data

To reduce downtime and ensure that no complications occur on the live system it is recommended that you perform the importing of the NAV objects and configuration data on a duplicate of your live database. Once the objects and configuration have been imported the system can be adjusted to match your requirements. When you have a Zetadocs configuration that you are happy with this can be exported using the Zetadocs Configuration Export form. This will produce an xml file which will enable you to transfer the setup onto the live system much more quickly and with more confidence.

7.1 Creating a test NAV system

Creating a test NAV system is recommended as in conjunction with our Zetadocs Configuration Export form you are able to create your Zetadocs for NAV system in a test environment. The configuration can then be exported meaning that the live system will operate as desired immediately after completing the importing of the Zetadocs for NAV objects and config.xml file. If you are not intending to setup your system in a test environment then continue from section 7.2 below and skip section 23 Migrating to the live database.

There are a number of ways to create a copy of your existing NAV database, depending on the version of NAV and the type of database being used. If the method outlined below doesn't match your setup then please refer to your NAV support documentation for additional details.

Creating a copy of your NAV database
- Open the NAV client and open the database in question.
- From the main menu select **Tools→Backup**.
- Save a copy of your NAV database in a safe location.
- Select **File→Database→New** and create a new duplicate system.
- Next select **Tools→Restore** and select the backup database you just created.

You are now ready to begin importing the Zetadocs for NAV objects and Standard Configuration.

7.2 Terminology
- Zetadocs for NAV Objects
- This is how we define the NAV objects that we add to the database and are all within our object range 9009959 - 9001018.
- This is how we define the existing NAV objects which we modify to integrate Zetadocs for NAV with an existing database. To assist in the installation of our interfaces we provide many interface .fob and .txt files for different languages and versions.

7.3 NAV License

To successfully install Zetadocs for NAV you require a Zetadocs for NAV VAR NFR granule to be added to your license.

Required Granules
To use Zetadocs for NAV you require the Zetadocs for NAV Granule to be added to your license.

Granule 9009961 – Zetadocs Execute Granule
Granule 9009970 – Zetadocs for NAV Granule

Optional Granules
To take advantage of Zetadocs for NAV integration with NAV Contacts you require the Contact Management Granule.
Granule 5500 – Contact Management
Granule 5510 – Contact Management - Basic

Optionally you can also purchase the Zetadocs for NAV SDK Granule which allows the running of customizations made in the Zetadocs Customization codeunit 9009962.

Granule 9009980 – Zetadocs for NAV SDK

Note: To activate the code of this granule you must create a record in the Zetadocs System Settings table as follows:

- From the Object Designer, run table 9009959
- On an empty row, create a new record with:
- Name = SDKEnabled
- Bool = True
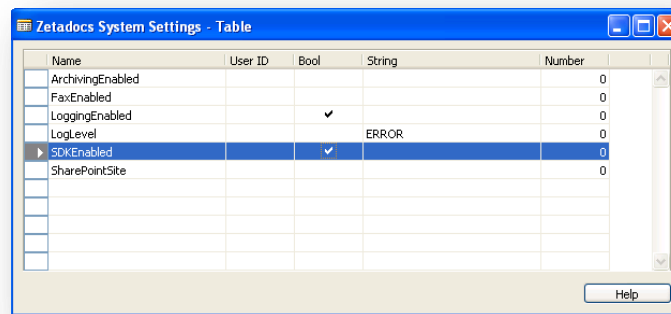
<p align="center">**Figure 16 - Enabling the Zetadocs SDK**</p>

7.4 Backing up the existing NAV Objects
In order to be able to uninstall Zetadocs for NAV software it is necessary to backup the Navision objects before installing the Zetadocs for NAV objects. Please perform the following tasks:

- Open the Navision client and connect to/open the Navision database.
- Open the **Object Designer** (Tools→Object Designer).
- Click on **All** button in the designer menu.
- Select **All objects (CTRL + A).**
- Select **File→Export**.
- Export objects to a ***Backup of Objects before Zetadocs for NAV4.1.fob*** file.
- Keep the ***Backup of Objects before Zetadocs for NAV4.1.fob*** in a safe place.

7.5 Importing Zetadocs for NAV Objects
IMPORTANT: *Before you import the Zetadocs for NAV objects, you must ensure that you have completed the instructions on installing the Zetadocs for NAV Client as a local administrator on the machine from which you intend to import the Zetadocs for NAV objects into your NAV database.*

 This ensures that relevant automation objects are installed on that machine to enable compilation of the Zetadocs for NAV objects when imported into NAV.
- Log into Microsoft NAV as a user with **SUPER** user permission rights to allow you to import new objects into the NAV database.

- Open the **object designer** (Shift + F12) and import the relevant file to the NAV system you are running from the table below by selecting **File→Import.**
- The files are included on your Zetadocs for NAV CD or download. They can be found in *<CD Drive>:\Zetadocs NAV Server Components* followed by the relevant country code and NAV version e.g. *<CD Drive>:\Zetadocs NAV Server Components\DE\5.00\Zetadocs for NAV V4.1 Objects - NAV5.00.fob*

NAV Version	Fob file to use
NAV 6.01 (2009)	*Zetadocs for NAV V4.1 Objects - NAV6.01.fob*
NAV 6.00	*Zetadocs for NAV V4.1 Objects - NAV6.00.fob*
NAV 5.00	*Zetadocs for NAV V4.1 Objects - NAV5.00.fob*
NAV 4.00	*Zetadocs for NAV V4.1 Objects - NAV4.00.fob*

- Assuming there are no collisions with existing objects continue importing objects and ensure that there have been no compilation errors. If you have object collisions or compilation errors refer to the troubleshooting section at the end of this document.

8. Zetadocs Feature Specific Steps

This section will detail the setup of those features which are not required for all installs. These features should be installed on a per feature basis if you require them. For those installing Zetadocs Capture you are required to install all the options below, for Zetadocs Delivery customers they should be installed as required.

Zetadocs offers a number of features which can be installed as required, each of these features has its own setup instructions in this section so please follow them as required.

- SharePoint Archiving Support (Required for Capture Functionality)
    - o Allows users to archive and retrieve items sent via Zetadocs to SharePoint, when used in conjunction with the SharePoint extensions.
- Role Tailored Client Support (Required for Capture Essentials Functionality)
    - o Enables use of the Role Tailored Client with Zetadocs for NAV.
- Customer/Vendor cards modifications for SharePoint Archiving and Zetadocs Rules
    - o Adds Zetadocs Archive and/or Zetadocs Rules options to the Customer and/or the Vendor Card. This facilitates access to these features from the particular customer/vendors card speeding modification of their specific delivery settings and archive searches.

8.1 SharePoint Archiving Support

For systems which intend to make use of archiving you will need to adjust to some existing NAV tables to add a Zetadocs Archive ID field. This field is required to successfully archive documents from NAV and in the case of SharePoint archives to retrieve them from within NAV. The table changes required for archiving can be performed in two different ways. Firstly there is a set of fob files located on the product CD which can be imported; these versions of the tables are based upon the original vanilla tables provided as part of your version of NAV. To these the relevant fields have been added, as such if your system does not contain modified versions of these tables you can import these tables. NAV will check for collisions on import, if these occur they should be reviewed whereby you will be able to decide whether to import the fob file or ignore this step and perform the adjustments manually.

Importing the Tables fob file

The following actions must be followed by someone using a world 1 database version 5.00. If your system is different, you need to select the file that is relevant to your system.

- Log into Microsoft NAV as a user with **SUPER** user permission rights to allow you to import new objects into the NAV database.
- Open the **object designer** (Shift + F12) and import the interfaces file included on your Zetadocs for NAV CD.
    - o ***Zetadocs for NAV V4.1Interfaces – NAVW15.00 (Tables).fob***

    It can be found in ***<CD Drive>:\Zetadocs NAV Server Components\<language code>\<database version>***.
- If there are no collisions continue with the import. Should collisions occur it is recommended that you export your existing objects, and then compare the version of the objects with the text file versions of the interfaces detailed above. This will determine the safety of the available merge/replace options available in the import worksheet.

If it is impossible to merge to tables in your database, please refer to below for instructions on how to modify the tables manually.

Modifying NAV Tables Manually

To enable archiving and retrieval of reports using Zetadocs for NAV you must add a field to a number of tables in your database. This is done to link the records from the table with the archived documents. This is done by adding a custom Zetadocs GUID field to the table. This must be done to the table before attempting to send a report based upon it. The following actions will guide you through the process.

- Log into Microsoft NAV as a user with **SUPER** user permission rights to allow you to import new objects into the NAV database.
- Open the object designer (Shift + F12) and navigate to the tables listed below.

- Before adding the field you need to pick a field no. from the free range which is available in all related tables. This is to maintain documents referencing after operations such as posting. For example: If I add the "Zetadocs Archive ID" field to Table 36 – Sales Header with field no. 50000, then I should add the same field in Table 112 – Sales Invoice Header with the same field no.
- Add a field called **"Zetadocs Archive ID"** of type **GUID** with your chosen field no. You must enter the name exactly as stated. Upper and lower casing must be correct as well as spacing.

Changes to be made to the Tables

To enable archiving and retrieval of reports to and from SharePoint Zetadocs for NAV fields are added to the following tables. This is to link that record with the archived documents.

Table No.	Table Name	Field No.	Name	Data Type
18	Customer	9009959 when importing the fobs or your choice from the free range of Field No.'s e.g. 50000	Zetadocs Archive ID	GUID
36	Sales Header	9009959 when importing the fobs or your choice from the free range of Field No.'s e.g. 50000	Zetadocs Archive ID	GUID
110	Sales Shipment Header	9009959 when importing the fobs or your choice from the free range of Field No.'s e.g. 50000	Zetadocs Archive ID	GUID
112	Sales Invoice Header	9009959 when importing the fobs or your choice from the free range of Field No.'s e.g. 50000	Zetadocs Archive ID	GUID
114	Sales Cr.Memo Header	9009959 when importing the fobs or your choice from the free range of Field No.'s e.g. 50000	Zetadocs Archive ID	GUID
6660	Return Receipt Header	9009959 when importing the fobs or your choice from the free range of Field No.'s e.g. 50000	Zetadocs Archive ID	GUID
23	Vendor	9009959 when importing the fobs or your choice from the free range of Field No.'s e.g. 50000	Zetadocs Archive ID	GUID
38	Purchase Header	9009959 when importing the fobs or your choice from the free range of Field No.'s e.g. 50000	Zetadocs Archive ID	GUID
120	Purch Rcpt. Header	9009959 when importing the fobs or your choice from the free range of Field No.'s e.g. 50000	Zetadocs Archive ID	GUID
122	Purch. Inv. Header	9009959 when importing the fobs or your choice from the free range of Field No.'s e.g. 50000	Zetadocs Archive ID	GUID
124	Purch. Cr. Memo Hdr.	9009959 when importing the fobs or your choice from the free range of Field No.'s e.g. 50000	Zetadocs Archive ID	GUID
6650	Return Shipment Header	9009959 when importing the fobs or your choice from the free range of Field No.'s e.g. 50000	Zetadocs Archive ID	GUID

8.2 Role Tailored Client Compatibility

To enable the operation of Zetadocs for NAV with the Role Tailored Client, Page Interfaces are provided for the W1 versions of NAV 6.01. These pages will add the Related Documents Grid to your RTC, the drag and drop functionality is installed as part of this process.

Note: Those systems without a valid Capture Essentials license will be not see the drag and drop control displayed.

- Log into Microsoft NAV as a user with **SUPER** user permission rights to allow you to import new objects into the NAV database.
- Open the **object designer** (Shift + F12) and import the interfaces file included on your Zetadocs for NAV CD relevant to your NAV version. E.g. **Zetadocs for NAV V4.1 Interfaces – NAVW16.01 (Pages).fob**
- It can be found in <CD Drive>:\Zetadocs NAV Server Components\<language code>\<database version>\.
- If there are no collisions continue with the import. If there is a collision it is recommended that you export your existing objects and compare version of the objects with the text file versions of the

interfaces detailed above to determine the safety of the available merge/replace options in the import worksheet.

Manually adding the related documents grid to existing pages in NAV

Should you decide not to install the Zetadocs for NAV V4.1 Interfaces (Pages).fob file relevant to your NAV version, or merge it with your existing file, the instructions below can be performed to add the related documents grid, including the Capture Essentials features if licensed, to your Role Tailored Client pages as required.

- Log into Microsoft NAV as a user with **SUPER** user permission rights to allow you to import new objects into the NAV database.
- Open the **object designer** (Shift + F12) and select the page that needs to be modified and click the **Design** button.
- Locate the part on the page where you wish to locate the related documents grid, often after the general tab. For example on the Customer card we can place it below the General tab in between it and the Communication tab, on viewing the card we can see that this starts after the **Last Date Modified** field before the Communication tab.
- In the Page Designer scroll down to the Last Date Modified field and select the row below this and right click on it and choose **New**.
- In the blank line that has been created enter the name as **Zetadocs**.
- Change the Type field value to **Part**.
- Select the new line and press **Shift+F4** to show the properties window.
- Change the **PagepartID** to **Zetadocs Related Docs List**. It should look something like the screenshot displayed below:

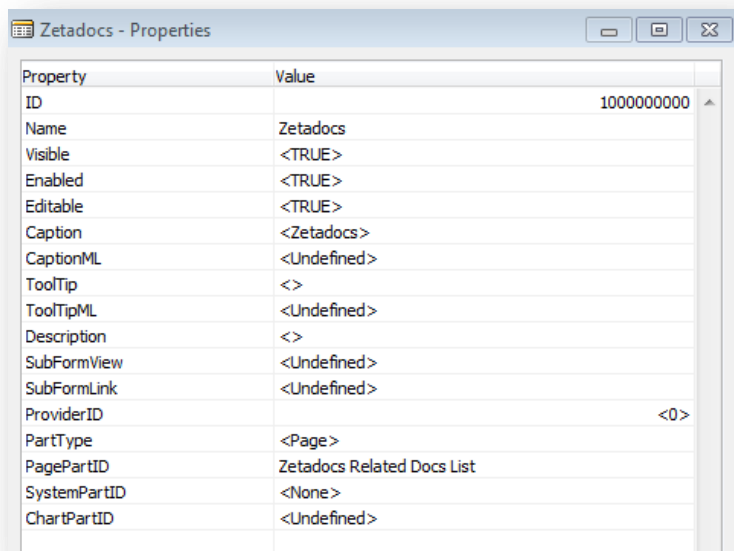*Figure 17 – Zetadocs Properties*

- Press **F9** to display the code window.
- In the **OnAfterGetRecord()** trigger add a local variable:
- **Name:** RecRef
- **DataType:** RecordRef
- In the trigger add the following code:
- RecRef.GETTABLE(Rec);
- CurrPage.Zetadocs.FORM.SetRecordID(RecRef.RECORDID);
- Close the page designer windows.
- Click **Yes** when prompted to compile and save the changes.

8.3 Card modifications for Archiving and Zetadocs Rules

These form interface changes enable users of the NAV system to access the Zetadocs Rules and Archive from throughout various cards and appears in NAV, as shown in the figure below.

Zetadocs Rules: Opens the Zetadocs Customer Rule Card for the customer selected.
Zetadocs Archive: Opens the Related Documents form containing documents that have been dragged and dropped into the archive using Zetadocs Capture Essentials. You can drag and drop documents into the archive by dragging then into the "Drag and Drop documents here" area.

To make the required changes we have provided a Form Interfaces fob file for each of the supported languages.
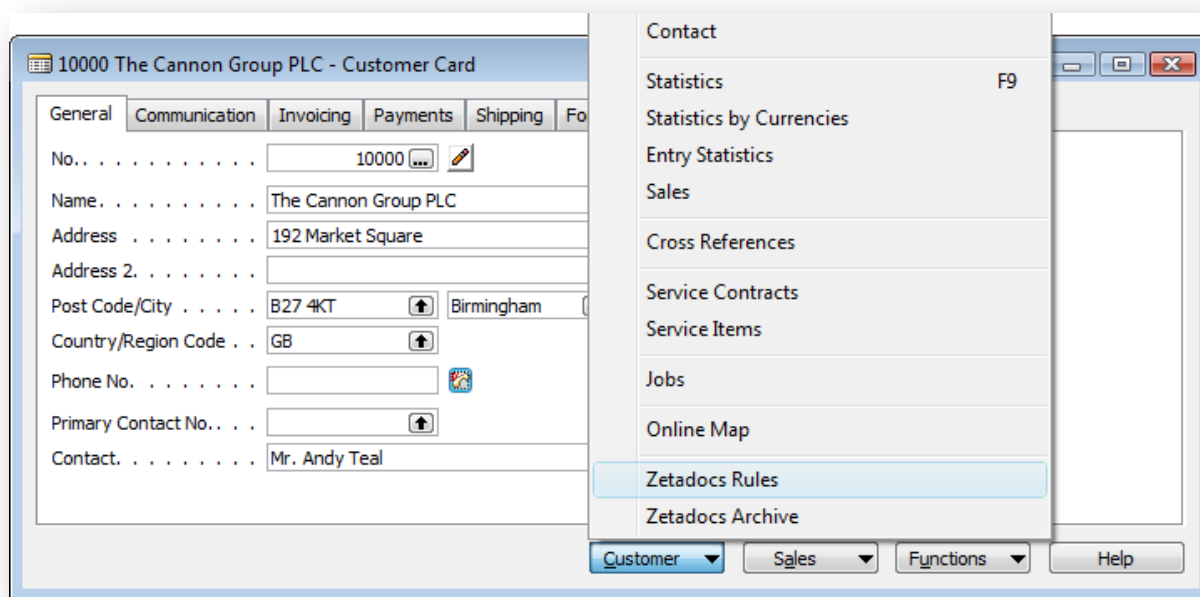
Figure 18 – Customer Card with Zetadocs Rules menu item added

Importing the Forms fob file
- Log into Microsoft NAV as a user with **SUPER** user permission rights to allow you to import new objects into the NAV database.
- Open the **object designer** (Shift + F12) and import the interfaces file included on your Zetadocs for NAV CD relevant to the version and language of your install. e.g. Zetadocs for NAV V4.1 Interfaces – NAVW16.01 (Forms).fob

It can be found in ***<CD Drive>:\Zetadocs NAV Server Components\<language code>\<database version>***.
- If there are no collisions continue with the import. If there is a collision it is recommended that you export your existing objects and compare the version of the objects with the text file versions of the interfaces detailed above, to determine the safety of the available merge/replace options in the import worksheet. If it is impossible to replace or modify the existing forms in your database, please refer to the following section for instructions on how to modify the existing forms manually.

Modifying NAV Forms Manually
If when attempting to import the Zetadocs for NAV forms into NAV you have collisions which make it impractical to import the forms the following manual steps can be performed to provide the same functionality.

Zetadocs Rules
To allow users to adjust the rules for a customer or vendor from an option on the relevant card we require a modification of the customer and vendor rule cards. The steps outlined below will add the Zetadocs Rules menu item to the Customer button on the Customer card, see the above figure, and the Vendor button on the Vendor card.

Adding the Zetadocs Rules to the Customer Card
- Open the object designer (Shift + F12)
- Open the Form in **Design View**.
- Select the **Customer** button.
- Right Click and select menu items.
- Scroll down and create the new menu item **Zetadocs Rules**.
- Set the Action to **RunObject**.
- In the RunObject field enter Form Zetadocs Customer Rule Card.
- Select **View →Properties** menu item or press Shift+F4.
- Set the run form link to Customer No. = FIELD(No.).
- Repeat this process for the Vendor Card using Vendor No. = FIELD(No.).

SharePoint Archiving

The following changes enable searching of SharePoint for existing archived documents from the card in question by adding the Zetadocs Archive search menu item. Unlike the Zetadocs Rules which pertain to a particular Customer and Vendor Before making these form changes you must ensure that you have applied the tables changes detailed earlier.

Adding the Zetadocs Archive menu item can be done manually in several manners, we have provided details for two of these methods below. Which you choose to implement is a matter of personal preference however the second method is generally more efficient if you are rolling the feature out across a large number of the above listed forms, which the first is better suited for small numbers of form modifications.

Method 1
- Log into Microsoft NAV as a user with **SUPER** user permission rights to allow you to import new objects into the NAV database.
- Open the **object designer** (Shift + F12) and select the form that needs to be modified and click the **Design** button.
- In this example we will look at modifying a Sales Quote form, for other form modifications please follow these steps and select the relevant option to your form when prompted.
- Right-click on the **Quote** button, or the corresponding button on your form, and select **Menu Items.**
- Scroll down and at the bottom add a separator by using the **Separator** button.
- Add a menu item with caption **Zetadocs Archive**.
- While still on the Zetadocs Archive menu item, open up the **C/AL Code editor** by pressing **F9**.
- In the **OnPush ()** trigger of the menu item add a local variable:
  - **Name:** RecRef
  - **DataType:** RecordRef
- Add a second local variable
  - **Name:** ZetadocsUtilities
  - DataType: Codeunit
  - **Subtype:** Zetadocs-Utilities.
- Next, add the following code into the **OnPush()** trigger of the menu item:
RecRef.GETTABLE(Rec);
ZetadocsUtilities.ShowRelatedDocsDialogEx('ZDARCHID', RecRef.RECORDID, STRSUBSTNO('%1-%2', CurrForm.CAPTION, "No."));
- Close the form designer windows. Click **Yes** when prompted to compile and save the changes.
- Repeat this process for any other required forms.
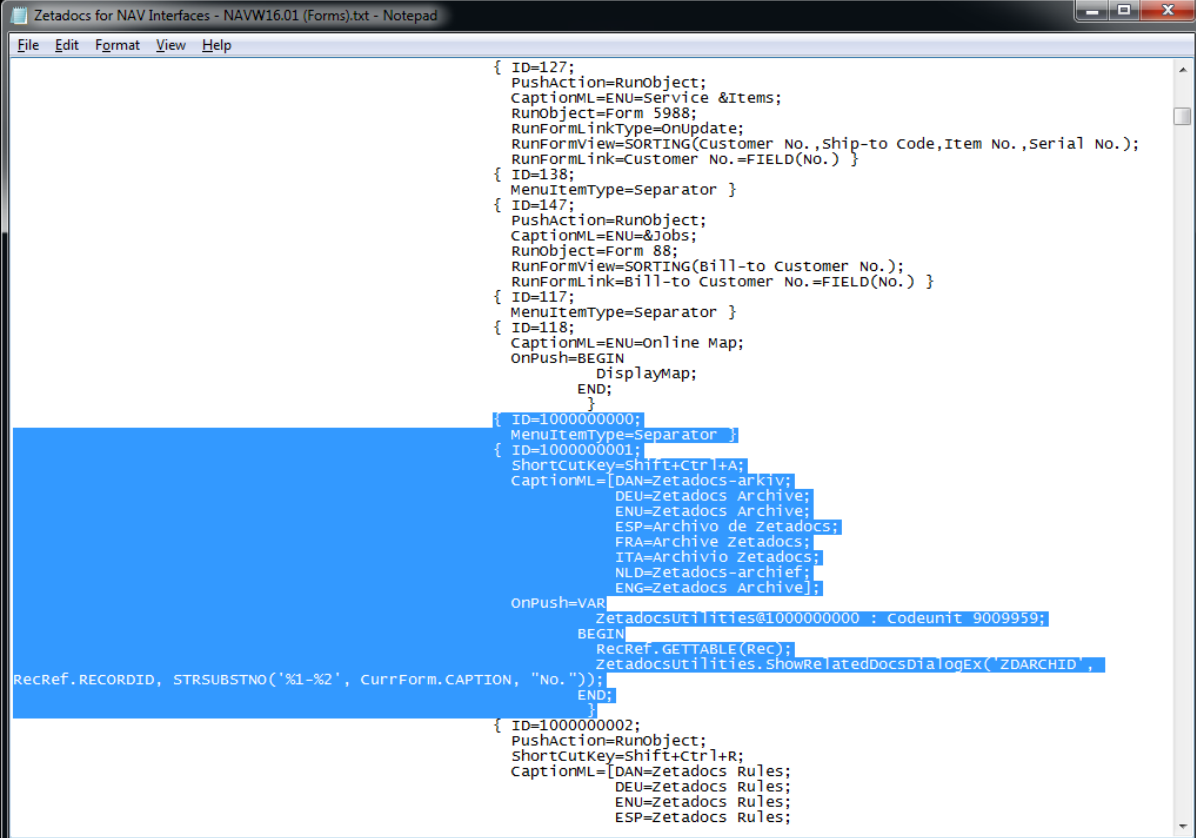
Method 2
- Open the form in the object designer.
- Select the **FORM** button.
- Select all the forms you require from the table above using **CTRL + Left Click**.
- Export the objects to text file. **File→Export**.
- Locate the appropriate Zetadocs for NAV Interfaces (Forms) text file for your NAV version (4.0, 5.0, 6.0 or 6.01) on your Zetadocs for NAV CD or download from the W1 folder.
- Either use a file comparison tool or search for **Zetadocs Archive ID** to identify the menuitem code to copy and paste into the respective objects.

NOTE*:* The code differs between the company cards Customer/Vendor and the other record cards so you should copy and paste from the correct objects.

- Copy and Paste the **separator and menuitem code** from the Zetadocs for NAV Interfaces text file and paste it into the respective area in your exported forms text file.
- **Save** the changes and import your updated text file in to NAV.
- Add the "EQX.XX" identifier to the Version List for each of the modified forms. (Where X.XX is the Zetadocs for NAV version).
- Compile the modified forms.
- Check that the appropriate menu items have been created by running the form and check the modified menu buttons.
- If you commonly update databases of this version it is recommended that you label and save your updated objects in a .fob file for use in future installations.

Figure 19 - Zetadocs Archive Menuitem Code

Adding Capture Essentials Features to other Forms

The Drag and Drop functionality is available on the Zetadocs Related Documents form which users access through the Zetadocs Archive option we have been adding to forms in the above steps. If you wish to add this functionality to a specific form directly instead of using the Related Documents form please view the instructions in section 27.7 in the appendices.

9. Modifying NAV Reports to work with Zetadocs

This section details the changes required to enable a NAV report to be sent using Zetadocs.
To make the process simpler and faster there is a sample report fob which you should have imported earlier which contains a modified version of some of the standard NAV reports with the changes necessary to enable it for sending with Zetadocs. It is recommended that you complete the previous sections of this installation document before attempting to create a Zetadocs for NAV report, because much of the code to be added to an existing report depends upon other Zetadocs for NAV objects.

9.1 Report Modification Methods

The sample NAV reports provided are based upon the standard NAV reports as shipped, as such if you have any other modifications to your reports swapping the Zetadocs sample report for your existing report will remove these changes.

As such there are three options available to you to enable your reports to work with Zetadocs:

- Use the sample Zetadocs report in place of the existing report of the same type.
- Use the Zetadocs NAV Report Modification Tool to update your existing reports.
- Manually make the required changes, either by updating your existing reports using the manually steps outlined later. Alternatively if you are more familiar with performing the existing non Zetadocs modifications you can modify the Zetadocs Sample reports with your existing changes.

Note: You do not need to use the same method for each report as you may have a mixture of standard and modified reports in your existing system.

9.2 Backup Reports

In order to be able to uninstall the Zetadocs for NAV software it is necessary to backup any NAV reports you are editing before installing the Zetadocs for NAV objects. Alternatively, reports can be duplicated and saved with new report ID's before adding the Zetadocs for NAV changes. Either way it is important to add the Version List **EQ4.1** after saving the completed report.

- Open the NAV client and connect to/open the NAV database.
- Open the **Object Designer** (Tools→Object Designer).
- Click on **Report** button in the designer menu.
- Select all the reports that you are going to edit for Zetadocs for NAV.
- Select Export objects in file menu (**File→Export**).
- Export objects to a ***Backup of Reports before Zetadocs for NAV4.1.fob*** file.
- Keep the ***Backup of Objects before Zetadocs for NAV4.1.fob*** in a safe place.

9.3 Importing the Sample Reports Forms fob file

Regardless of whether you wish to utilise our sample reports if you are intending to utilise Zetadocs Delivery they need to be imported even if only reference material for you to review. This is because the standard configuration files used later in the installation process will require them.

- Log into Microsoft NAV as a user with **SUPER** user permission rights to allow you to import new objects into the NAV database.
- Open the **object designer** (Shift + F12) and import the reports file included on your Zetadocs for NAV CD.
- It can be found in <CD Drive>:\Zetadocs NAV Server Components\W1\<database version>\
- File options:
- Zetadocs for NAV v4.1 Sample Reports – NAVW16.01.fob
- Zetadocs for NAV v4.1 Sample Reports – NAVW15.00.fob

Sample Reports in fob file:

Report ID	Report Name
9009960	ZD-Blanket Purchase Order
9009961	ZD-Blanket Sales Order
9009962	ZD-Order Confirmation
9009963	ZD-Order

9009964	ZD-Purchase – Credit
9009965	ZD-Purchase – Quote
9009966	ZD-Purchase – Invoice
9009967	ZD-Sales – Credit Memo
9009968	ZD-Sales – Invoice
9009969	ZD-Sales – Quote
9009970	ZD-Statement
9009973	ZD-Return Order Confirmation
9009974	ZD-Return Order

9.4   Using the Zetadocs Sample Reports

If you are able to use our sample modified reports in place of your reports, if they were unmodified for example, then simply proceed to the steps in section 9.9 to assign these reports in NAV so they run in place of the existing reports. Otherwise use the steps below to configure any remaining reports which you require.

9.5   The Zetadocs NAV Report Modification Tool

Zetadocs for NAV comes with a Report Modification Tool which will edit your existing Classic Client Reports enabling them to work with Zetadocs. We are continuing to develop the report modification tool with lessons learned from ongoing system installations, please see our installation notes page for access to the latest version of the tool and any other updates relevant to your installation.

The following should be taken into consideration when using this tool:

- The Report Modification Tool is currently only compatible with NAV 5.x and NAV 6.x classic clients.
- The tool does not perform all the changes required for Role Tailored Client reports, to adjust Role Tailored Client reports we recommend running the reports through the tool and then performing the additional edits in section 9.8.
- An appropriate NAV license is required for exporting and importing the reports.

Using the Zetadocs NAV Report Modification Tool

- Open the NAV client and connect to/open the NAV database.
- Open the **Object Designer** (Tools→Object Designer) and select the Report view.
- Select each report requiring modification from the list.
- Click on **File→Export**. Save the reports as a text file in a suitable location.
- Explore your product download and select the **Zetadocs for NAV Report Modification Tool** folder.
- Select and run the **ZdNAVReportTool.exe**, the Zetadocs NAV Report Modification Tool will open.
- Click on the **Load Reports** option.
- The tool will ask you to select the version of NAV your reports have been exported from.
- Next the tool will ask you to browse to the folder containing your exported reports.
- When selected any valid reports will be loaded into the table display, with any invalid reports reported in a message dialog after the load operation has completed.
- Check that the reports listed are the correct set of reports that you wish to modify.
- Click the **Start** button and the Conversion Options window will appear.
- Modify the new report ID range if required. This specifies the starting ID that the Report Modification Tool will use for the first modified report. Subsequent reports will use values incremented from this base value.
- Modify the report name prefix if required. This specifies a 0 to 3 character prefix that all reports will have appended to their names. Leaving the prefix blank will allow the existing report name to be used.
- The Merge output into a single file for importing into NAV option will be checked by default, if you wish to produce a separate file for each report uncheck this option.
- A dialog may pop up asking to delete the existing output directory if there already is one. You may wish to back up this directory before proceeding.
- During the conversion process, a progress bar at the bottom of the Report Modifier window gives an indication of the progress of the conversion job.
- A status column in the report list shows the status of the conversion process. If a report cannot be

modified, the reason will be listed in this column. For successful conversions, the new report ID and report name are given.

- The modified reports are now available in the folder containing the original reports, in an **Output** subfolder.
- Return to NAV and open the Object Designer (SHIFT + F12) and select the Report view.
- Click on **File→Import** and select the txt file to import, or files if you have had the tool produce separate txt files.
- Deal with any merge and conflict messages that may appear.
- Should you be modifying Role Tailored Client Reports you now need to perform the manual steps in section 9.8.
- Once Zetadocs for NAV has been correctly installed and configured, perform a test delivery with the imported report(s) to ensure they operate as expected.

9.6 Manually modifying your existing reports

The following instructions need to be followed to modify an existing report to work with Zetadocs, simply repeat these steps for each report you wish to configure.

- Open the report designer for the report that you want to modify.
- Scroll to the empty row at the bottom and create a new Integer data item called **Zetadocs**.
- Indent this data item once.
- Change the DataItemTableView property to SORTING(Number).
- Change the **MaxIteration** property to **1**.
- Now add the following global variables:

Name	Data Type	Sub Type
ZdSend	CodeUnit	Zetadocs-Send
ZdRecRef	RecordRef	

- Add the following code to the **OnPostDataItem** trigger for the Zetadocs data item:
- ZdRecRef.GETTABLE(⟨┄┄Main Data Item┄┄⟩);
- ZdSend.AddRecord(ZdRecRef.RECORDID);
- Select an empty row on the report and press **F9** to view the report code.
- Enter the following code after any existing code in the **OnPreReport** trigger:
    ZdSend.Initialize(CurrReport.OBJECTID(FALSE), CurrReport.PREVIEW);
- Enter the following code after any existing code in the **OnPostReport** trigger:
    ZdSend.ProcessRecords;

9.7 Classic Client specific layout modifications

Below are the instructions for modifying the classic report layout to include the Zetadocs reference, which is required to add addressing information to the report once it has been printed.

- Click **View → Sections** to show the classic client report designer.
- Open the toolbox and add a text box that it will appear at the top of the report.
- Change the SourceExpr property to ZdSend.GetZdReference(*<COPYNUMBER>*).
    (*<COPYNUMBER>* is **CopyLoop.Number** if you have a copy loop or **1** if not.)
- Change the **FontSize** property to **4**.
- Change the **DataSetFieldName** property to **Zetadocs_Reference**, Note: This field is only available in NAV 6.0 and later and should be ignored on earlier versions of NAV.
- Close the sections window.

9.8 Role Tailored Client specific layout modifications

Following are the instructions for modifying the layout of the report for use with the role tailored client. If your version of NAV does not have the role tailored client, skip this step.
There are two different methods that can be followed to add the Zetadocs reference to the role tailored client report depending on how it has been designed.

Body Section Only

The remittance advice journal report is an example of a report that does not have a page header section. When this is the case, follow the instructions below to add the Zetadocs reference.

- Click **View →Layout** to open the report designer for Role Tailored Client reports.
- Open the tool box and drag a new text box into the section of the report where the header data is displayed. **Note:** Ensure the textbox does not overlap any existing controls and put the text box at the top left of the section. If this is difficult you may need to mode existing text boxes and controls down a small bit. In general, existing text boxes have a parent listbox called list1. If this is the case then ensure that this new textbox has the same.
- Change the Value property to =Fields!Zetadocs_Reference.Value.
- Change the **Font size** and **Color** properties to values that you are happy with. Our recommended size is 6 and color is white so that this text is not visible sent document.
- Close and **save** the report.

Header and Body Section

The Order confirmation report is an example where the page header section is used to display header information on each page for the record. When this is the case, follow the instructions below to add the Zetadocs reference.

- Click **View →Layout** to open the report designer for the Role Tailored Client reports.
- Add a new text box to the body section of the report. Note: Ensure the textbox does not overlap any existing controls and put the text box at the top left of the section. If this is difficult you may need to mode existing text boxes and controls down a small bit. In general, existing text boxes have a parent listbox called list1. If this is the case then ensure that this new textbox has the same.
- Change the Name property to Zetadocs_Reference_tb.
- Change the Value property to =Fields!Zetadocs_Reference.Value.
- Change the **Visibility →Hidden** property to **TRUE**.
- Change the **Color** property to **Red**.
- Change the **Size** property to 6.
- Next, add a new text box to the top left of the page header section of the report. **Note:** Ensure the textbox does not overlap any existing controls.
- Change the **Font size** and **Color** properties to values that you are happy with. Our recommended size is 6 and color is white so that this information is not visible sent document.
- Change the Value property to =ReportItems!Zetadocs_Reference_tb.Value.
- Close and **save** the report.
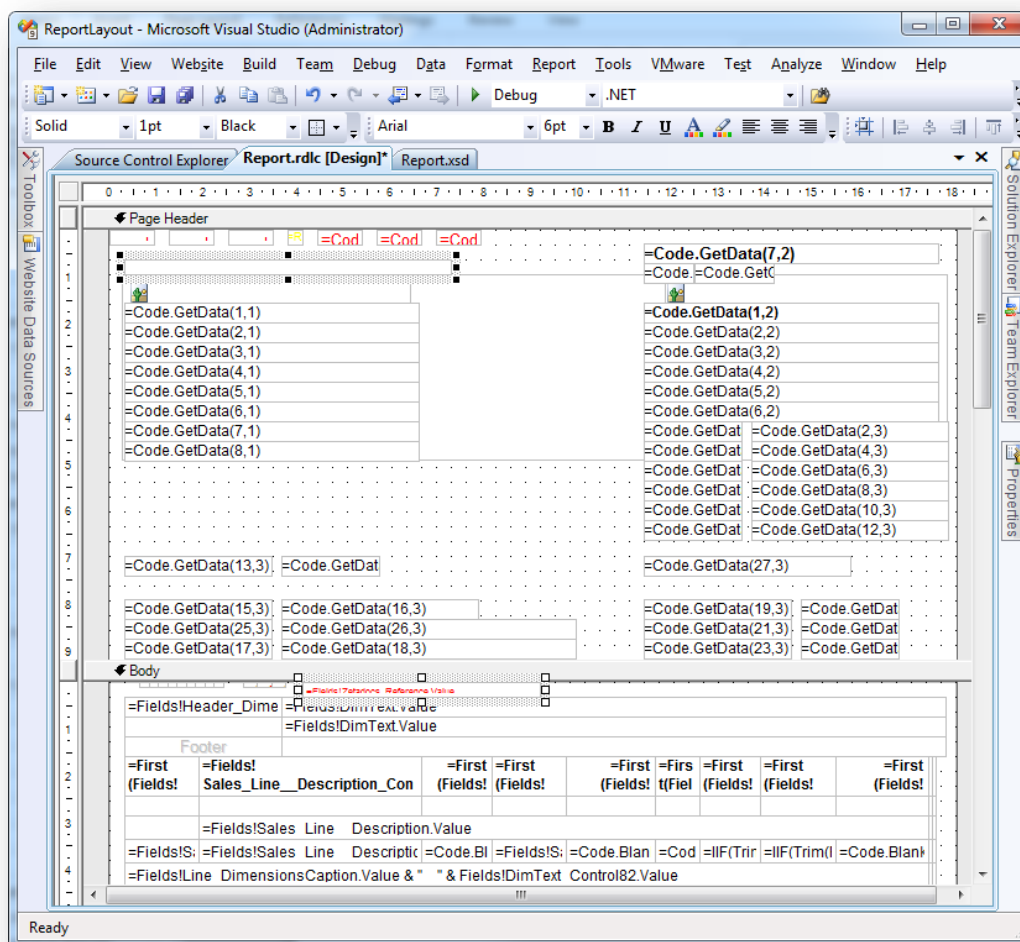
Figure 20 - Example of a modified Header and Body ReportLayout with both Zetadocs textboxes highlighted in position.

Version Code

Once you have saved the report add **EQ4.1** to the Version List column in the Object Designer. Adding this value is essential to ensure easy identification of reports modified for Zetadocs for NAV, in particular, for uninstalling Zetadocs for NAV at a later point.

9.9 Setting NAV to run the correct reports

Now that you have completed the report modifications we need to set NAV to run the correct reports. The steps below will take you through adjusting the Report Selections in NAV and the Zetadocs Report Settings Card to ensure the both reference the same reports.

Setting NAV to run the new report

If you are intending to use a sample report you will need to set NAV to run that report instead of the existing report. In this example we will set NAV to run the sample Order Confirmation report, this process should be repeated for each new report being used.

- Open the NAV client and connect to/open the NAV database.
- Select the **Administration** option from the **Navigation pane.**
- Expand the folder relevant to the report to be setup, in this case **Sales & Marketing.**
- Select **Report Selections,** the Report Selection – Sales card will open.

Figure 21 - Report Selection - Sales Card

- Select the Order report from the drop down.
- Click into the **Report ID** field and select the arrow to open the **Objects list**.
- Select the **new object** from the list, in this case 9009962 ZD-Order Confirmation.

10. Zetadocs Configuration

Zetadocs provides a range of standard data sets which populate the Zetadocs settings tables and provide a basic system setup. These are provided based upon the version of NAV, the system language/database e.g. GB or W1 as well as by feature set. This means there are specific configuration file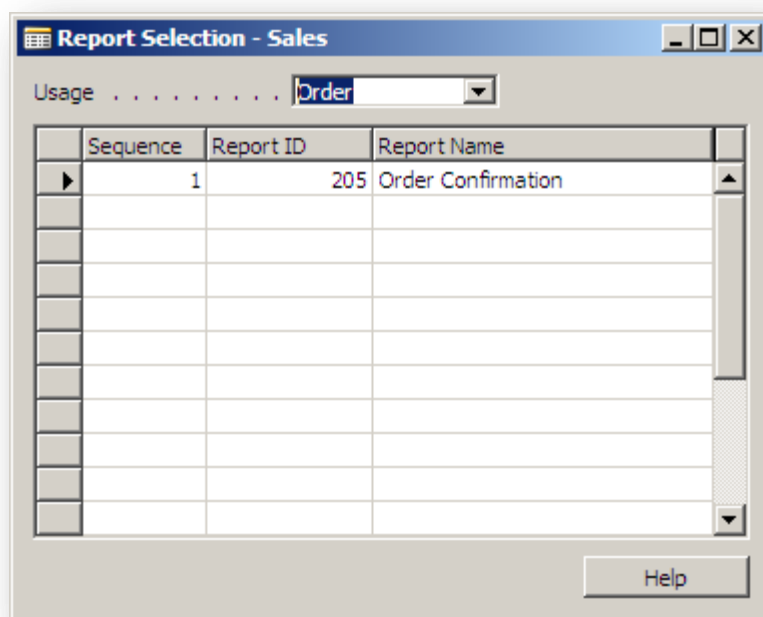s according to which modules you are installing, one for Delivery another for Capture and a third for both. Once this system base has been created using the standard configuration file you can then fine tune the system to operate as per your requirements. To import the data you will need to access the Zetadocs setup within NAV, if you have just imported the Zetadocs for NAV menusuite you will need to restart NAV to add these options to the Navigation Pane.

10.1 Importing the Zetadocs Standard Configuration Data

- Close and then open NAV to update the menusuite with the changes imported earlier and select the **Administration** option from the Navigation Pane.
- Select the **Application Setup** sub folder within it and then **Zetadocs Setup,** you may need to right click on the Navigation Pane and select **Refresh** to make the newly installed menusuite options available.
- Run the Zetadocs Configuration Import Form, the form shown in the figure below will appear.
- If you are using Zetadocs Delivery you need to identify where your templates are to be stored, choose either the checkbox for the default location or add the Template Path.
- Next select the **XML file path** field to browse to the file relevant to your NAV system version, in the **Zetadocs NAV Server Components** folder followed by the relevant country code and NAV version e.g. for a NAV 6 sp1 system installing Zetadocs Delivery only it would be **<CD Drive>:\Zetadocs NAV Server Components\W1\6.01\Zetadocs for NAV v4.1 Standard Data (Delivery) – NAVW1 6.01.xml**
- Once selected click the **Import** button.
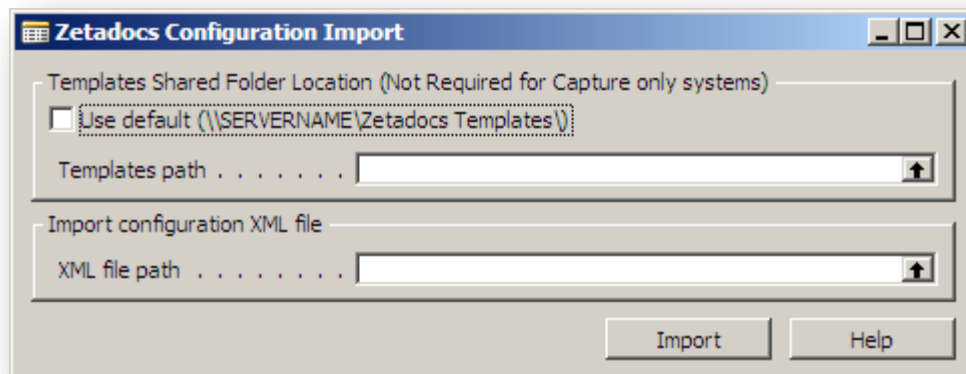
Figure 22 – Zetadocs Configuration Import Form

- A warning message will appear informing you that the import will clear all Zetadocs setup data from the tables, select **Yes** to continue.
- A final warning screen will appear asking you if you are sure you wish to import the data, select **Yes** to install the data. If you have not imported our Sample Reports and attempt to import either the Delivery or Both XML files you will see an error message. Either install the reports first of if not using Delivery select the Capture only XML file.

You will now have a basic system setup and should be able to print any reports setup earlier and they will be delivered as per the rules contained in the standard data.

10.2 Changes required for a basic Delivery working system

On importing the Zetadocs Standard Configuration data you will have populated the Zetadocs Report Settings Card, this data assumes you are using the sample reports provided. As such if you have modified some or all of the existing reports you now need to adjust the Zetadocs Report Settings accordingly.

- Open the NAV client and connect to/open the NAV database.
- Select the **Administration** option from the **Navigation pane.**

- Choose the **Zetadocs Setup** option and then **Advanced Settings**.
- Open the **Zetadocs Report Settings Card**.
- As you can see in the figure below we have associated a report in this case 9009969 (Sales – Quote) with a document set and associated settings.
- This report will not however be run by NAV unless the above edits to the Report Selections table have been done for this report so we need to adjust the Report ID to match the report NAV will run.
- Select the report you wish to modify the settings for.
- Select the **Report ID** field and choose the correct report from the Object list.
- Repeat the process for any remaining reports.
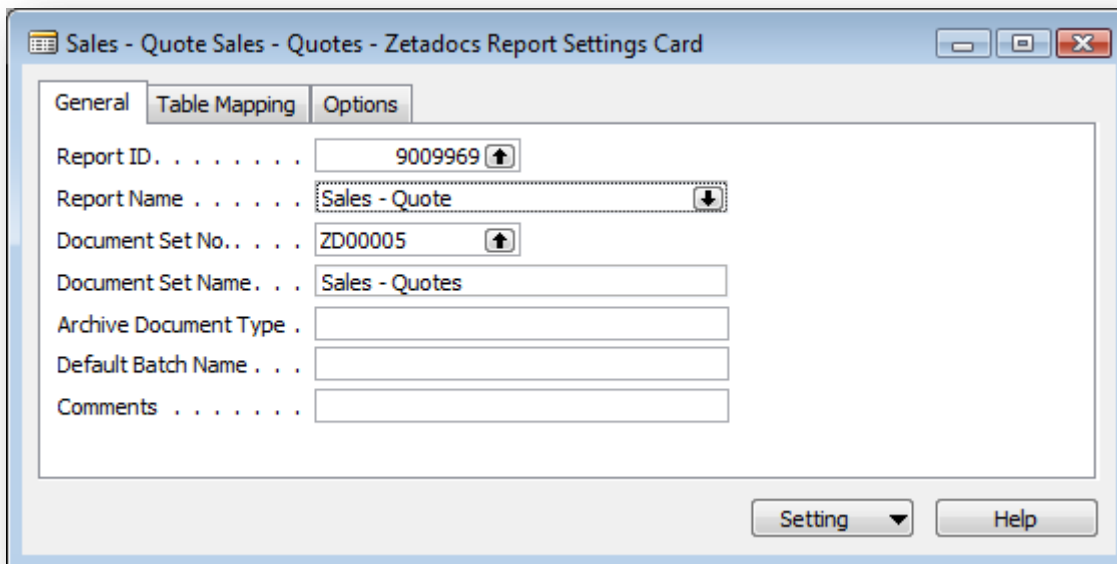
Figure 23 - Zetadocs Report Settings Card – General Tab

Properties:
- A report can only be associated with one Zetadocs Document Set.
- Many reports can be associated with one Zetadocs Document Set.

10.3 Understanding Zetadocs for NAV Standard Configuration

Having imported the standard configuration data and reports into NAV and added the few system specific pieces of information you should have a basic working system at this point. It should be capable of sending reports from NAV to recipients using the standard reports and templates included and should you have completed the SharePoint installation as well documents should also be archived to SharePoint.

Adjusting NAV Settings and Rules
The data imported into NAV reflects a standard installation and may not match your specific requirements; the main settings are as follows:

- Zetadocs System Settings – with Fax disabled, archive enabled
- Zetadocs Document Sets – standard set of templates for all Sales and Purchase documents
- Zetadocs System Rules – set rules with delivery, defaulting to email only
- Zetadocs Reports Settings – setup for all standard Sales and Purchase reports

Default System Settings
Archive Enabled: Depends upon archiving selection on import of configuration data.
Fax Enabled: No
Logging Enabled: Yes
Log Level: Error
Archive Folder Structure: Date (YYYY-MM-DD)

Report Name	Doc Set No.	Doc Set Name	Template ID.	Template Name	Delivery Method 1	Delivery Method 2	Delivery Method 3
Default	0	Default	ZT00000	Blank	Email		
Purchase Quote	ZD0001	Purchase - Quotes	ZT00001	ZD-Purchase Quote Template	Email		
Purchase Order	ZD0002	Purchase - Orders	ZT00002	ZD-Purchase Order Template	Email		
Purchase Return Order	ZD0003	Purchase - Return Orders	ZT00003	ZD-Purchase Return Order Template	Email		
Blanket Purchase Order	ZD0004	Blanket Purchase Orders	ZT00004	ZD-Blanket Purchase Order Template	Email		
Sales Quote	ZD0005	Sales Quotes	ZT00005	ZD-Sales Quote Template	Email		
Order Confirmation	ZD0006	Order Confirmations	ZT00006	ZD-Order Confirmation Template	Email		
Sales Invoice	ZD0007	Sales - Invoices	ZT00007	ZD-Sales Invoice Template	Email		
Sales Credit Memo	ZD0008	Sales Credit Memos	ZT00008	ZD-Sales Credit Memo Template	Email		
Sales Return Order	ZD0009	Sales Return Orders	ZT00009	ZD- Sales Return Order Template	Email		
Blanket Sales Order	ZD0010	Blanket Sales Orders	ZT00010	ZD- Blanket Sales Order Template	Email		
Remittance Advice Journal	ZD0011	Remittance Advice - Journals	ZT00011	ZD-Remittance Advice Journal Template	Email		
Statements	ZD0012	Statements	ZT00012	ZD- Statements Template	Email		
Purchase Invoice	ZD0013	Purchase Invoice	ZT00013	ZD-Sales Invoice Template	Email		
Work Order	ZD0014	Work Orders	ZT00014		Email		
Purchase Credit Memo	ZD0015	Purchase Credit Memo	ZT00015		Email		

By examining this table you should be able to identify the areas where the standard document delivery settings differ from your needs. The steps below will explain how to adjust these settings.

10.4 Setting the Zetadocs System Settings

To modify the default Zetadocs System Settings:

- Open NAV and select the **Administration** option from the Navigation Pane.
- Select the **Application Setup** sub folder within it and then **Zetadocs Setup.**
- Select the Zetadocs System Settings form.

Archiving Enabled

This option denotes whether Zetadocs will attempt to Archive documents on delivery or not. Enabling this option allows access to the two archiving location options below.

Shared Network Folder

Shared network folder archiving can be enabled by adding a suitable network folder location to this field. You must also ensure that all Zetadocs enabled users have permission to access this folder. **Note**: This option does not support any of the Zetadocs for NAV search features which require SharePoint integration.

SharePoint Site

This setting should be the address of your SharePoint document library, should you be utilizing one.

Fax Enabled

Requires the installation of a Zetafax system. For instructions on Zetafax installation please refer to the Zetafax Setup guide located on the Zetafax product CD. NOTE: When faxing is disabled on the Zetadocs

System Settings form the system does not prevent the creation of rules including fax, however, attempts to use fax addressing may prompt warnings during sending any documents that attempt to use fax addressing will be displayed in the Zetadocs Batch Delivery Settings Dialog as an error.

Logging Enabled
To be used for troubleshooting installations and support issues. Enabling logging causes a text based log to be written to each NAV user Windows %Temp% folder (*ZetadocsNAV.log*). The Log Level specifies the amount of detail in the log.

Log Level
ERROR – Only writes error information to the log
WARNING – Writes any potentially problematic and error information to the log
DEBUG- Writes all levels of detail for troubleshooting difficult problems. Recommended only when obtaining support or during installation and configuration.

Reference Prefix
The reference prefix is the first part of the reference code printed onto documents sent using Zetadocs, it can be a maximum of 15 characters long.
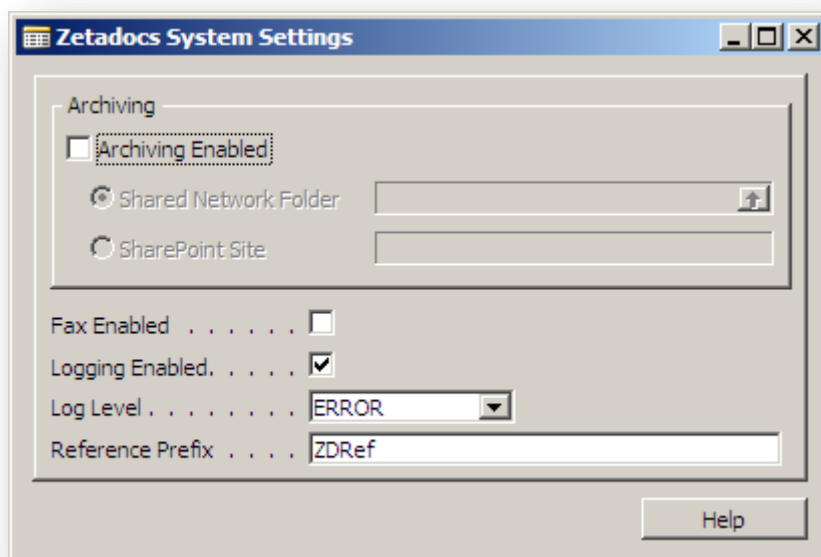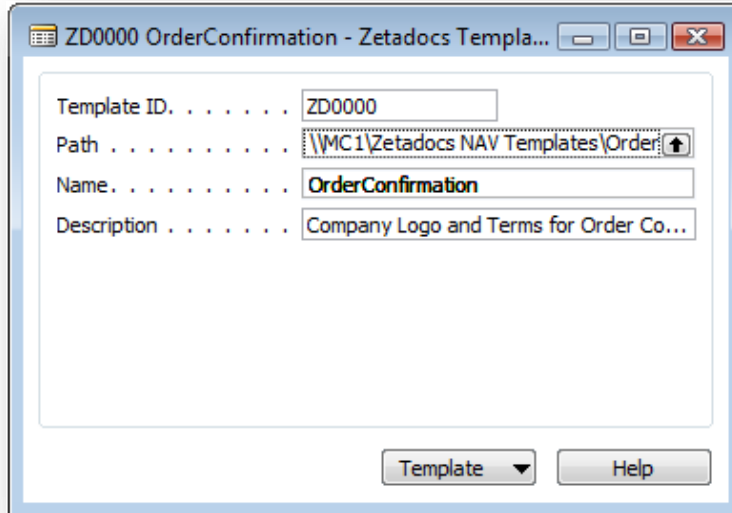
Figure 24 - Zetadocs System Settings

10.5 Template Settings
Zetadocs Templates combine stationery overlays and attachment documents as well as supplementary addressing for any document sent using that template from the Zetadocs Client. The templates can be created in the Zetadocs Client and saved to a shared network location. For more information on creating Zetadocs Templates and setting up Zetadocs Shared Network folders please consult the Zetadocs Client help. Zetadocs will already have created entries for each type of report supported, these can be modified in the Zetadocs Client, the section on document templates explains this further. Should you wish to change the template a report uses, for example if you wished to send out all correspondence for a period with special attachments or a message as part of a special offer. Then you can create additional templates in the Zetadocs client and assign them by doing the following.

- Open NAV and select the **Administration** option from the Navigation Pane.
- Select the **Application Setup** sub folder within it and then **Zetadocs Setup.**
- Select the Zetadocs Templates form.
- Select Template→List or press F5.
- Choose the Template you wish to modify and select OK.
- Select Path to choose another template.
- The name field will automatically populate, add a suitable Description and close the form.

Figure 25 - Zetadocs Template Card

10.6 Zetadocs System Rules

The Zetadocs System Rule card is where the Zetadocs Document Set rule is defined. It brings together the format (templates), delivery method (contact addressing) and archiving options (SharePoint document library, Archive Document Type and document library subfolder structuring).

- Define the default Zetadocs Document Set.
- Select the default document set (o)using the "Document Set No." property lookup on the "General" tab.
- Specify the desired delivery method failover order (remember to only specify **Fax** if you have Zetafax Server installed).
- Choose a "Template" from your imported template references.
- Enter an email address that reports using this rule will be sent from.
- On the Archiving tab enable archiving (remember only if you have SharePoint).
- Complete the remaining archive options if applicable.
- On the Additional Recipients section, enter the contact information of any additional contacts that will receive a copy of the reports using this rule.

Properties:
Once you have selected the document set to define, it cannot be changed for that record.
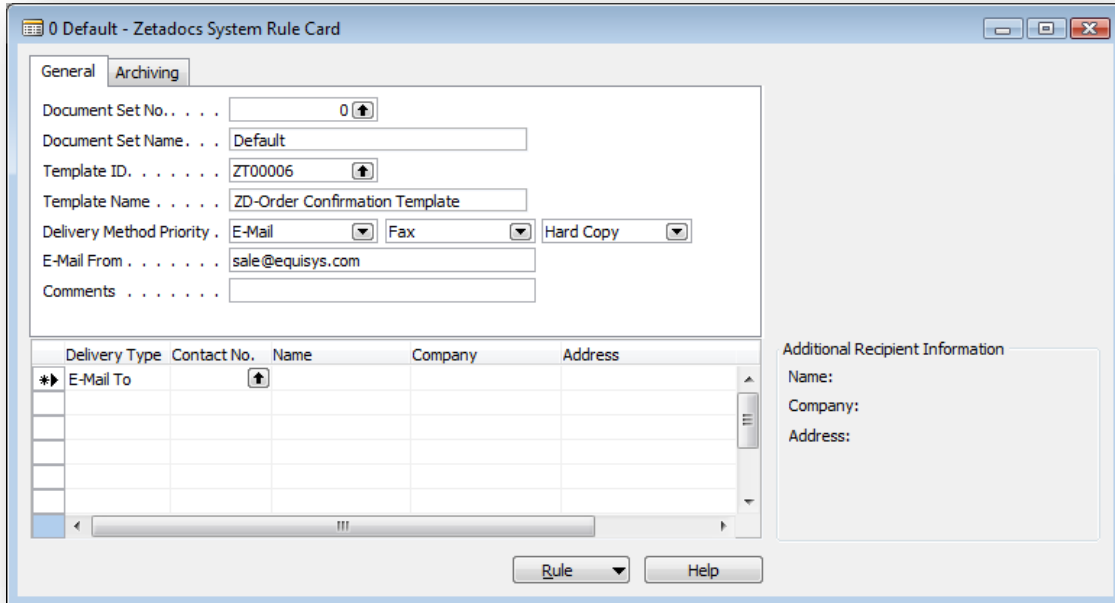
Figure 26 - Zetadocs System Rule Card – General Tab

General Tab

- **Delivery Method Priority**: Implies that if the contact information being used during the sending of a document that uses this rule is missing addressing information, the next highest priority method will be used. For example, if the *Delivery Method Priority* was **"E-Mail, Fax, Hard-copy"** and the contact information being used had no email information but did have fax information, then fax addressing would be used. Similarly, if there was neither email or fax information, then the document would be printed from Zetadocs to the local system default printer.
- **Template**: Optional.
- **Email From**: Optional. The user must have access to send emails using the address entered. If left blank the user's default email account will be used.
- **Comments**: Field for any additional information you may wish to add.
- **Additional Recipients**: Optional. This field is available on both the general and archiving tabs. Enter additional recipients either by selecting a contact or by entering the information manually. The delivery methods available are E-Mail (To, CC or BCC) and Fax. You can enter a maximum of 5 additional recipients for a system rule. E-Mail distribution lists are supported but they must be entered as their full E-Mail address and not an alias (E.g. support@equisys.com)
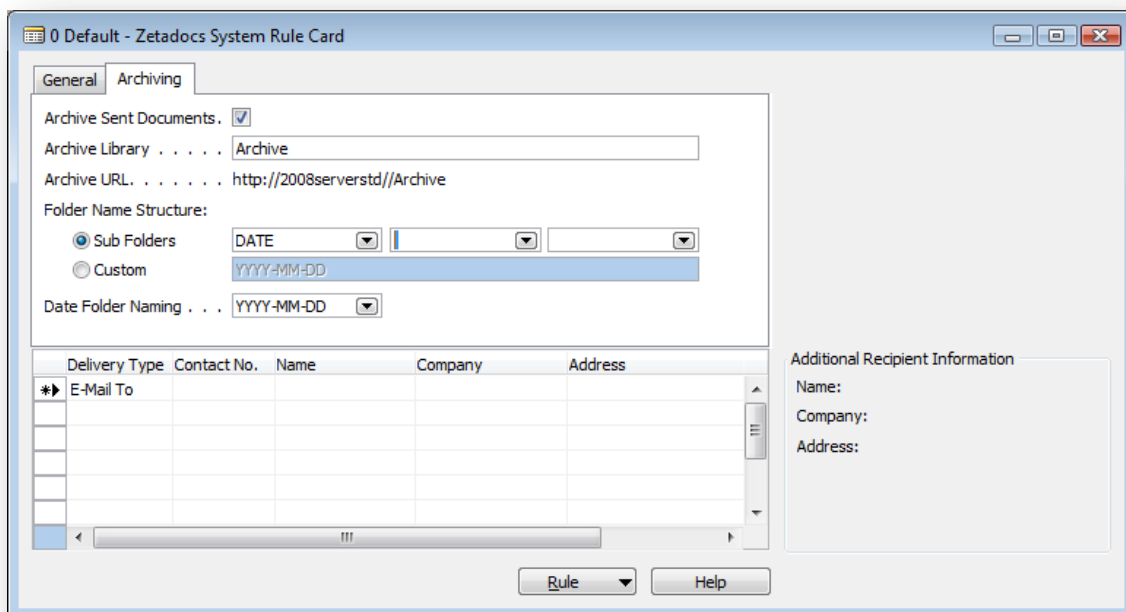
Figure 27 - Zetadocs System Rule Card – Archiving Tab

Archiving Tab
- **Archive Sent Documents**: Determines whether Zetadocs for NAV will attempt to archive sent documents.
- **Archive Library**: Only specify the SharePoint document library name, not the full URL.
- **Archive URL**: Displays the full target archive library by concatenating the SharePoint Site from the Zetadocs System Settings and the Archive Library property.
- **Folder Name Structure**: Subdivides archived documents into subfolders of the SharePoint document library based on information from the sent record. The **Custom** radio button allows you to specify new folder structuring values. Currently, no others have been implemented.
    - **COMPANY** – The recipient NAV *Customer* name
    - **DATE** – The Date with a format specified by the "Date Folder Naming" property
    - **DOCTYPE** – The Archive Document Type as specified for the current Zetadocs Document Set, or its override in the Zetadocs Report Settings
- **Date Folder Naming**– Allows you to specify the format of the date folder structure in the SharePoint archive. E.g. YYYY-MM-DD, DD-MM-YYYY, MM-DD-YYYY etc.

10.7 Zetadocs Report Settings

The Zetadocs Report Settings is where Zetadocs enabled reports can be associated with a particular Zetadocs Document Set and therefore a rule definition for sending (template, delivery method, archiving settings, additional recipients). It is also where recipient information settings are specified. The configuration data will populate these fields with our standard data setup, it may be necessary to adjust these values to meet your requirements.
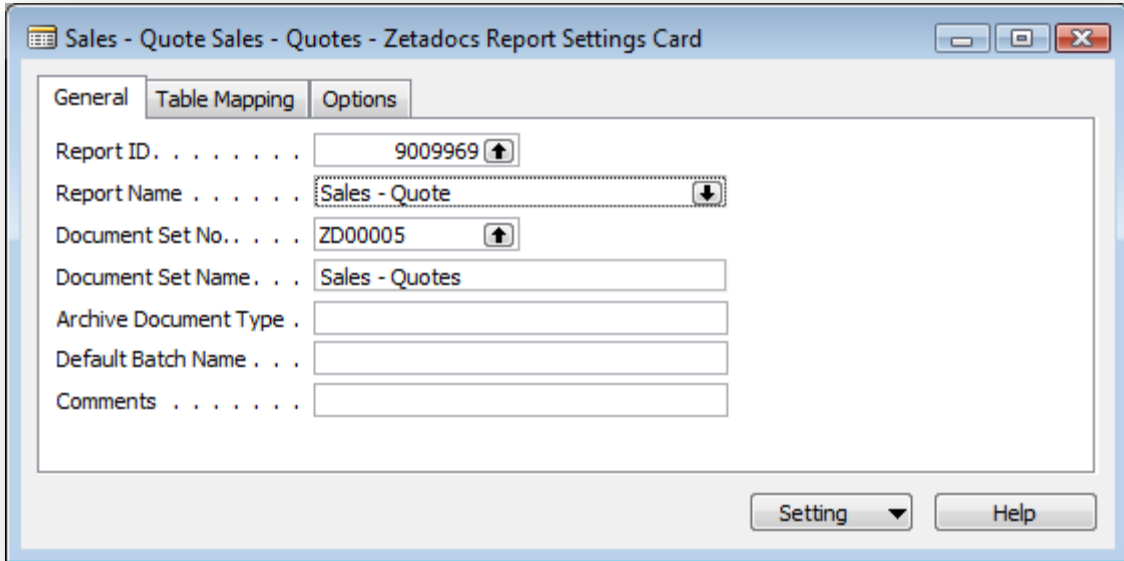
Figure 28 - Zetadocs Report Settings Card – General Tab

Properties:
- A report can only be associated with one Zetadocs Document Set.
- Many reports can be associated with one Zetadocs Document Set.

General Tab
- **Report ID:** The Report ID is unique value given to identify each report.
- **Report Name:** This field is populated when the Report ID is selected.
- **Document Set No.:** The Document Set No. corresponds to the key field of the Zetadocs System Rule Table linking the report to rules for its distribution.
- **Document Set Name:** Contains the name of the rule that is being applied to the report, it is determined via the Document Set No. selection.
- **Archive Document Type:** The Archive Document Type determines the document type the report will be stored under in SharePoint, please ensure you have created the appropriate content types in your SharePoint archive to match these settings.
- **Default Batch Name:** When a report prints a number of records to Zetadocs they are held in a batch in the Zetadocs Client. This field allows you to specify a name for the batch that will be visible in the Zetadocs Client document explorer.
- **Comments:** Field for any additional information you may wish to add.
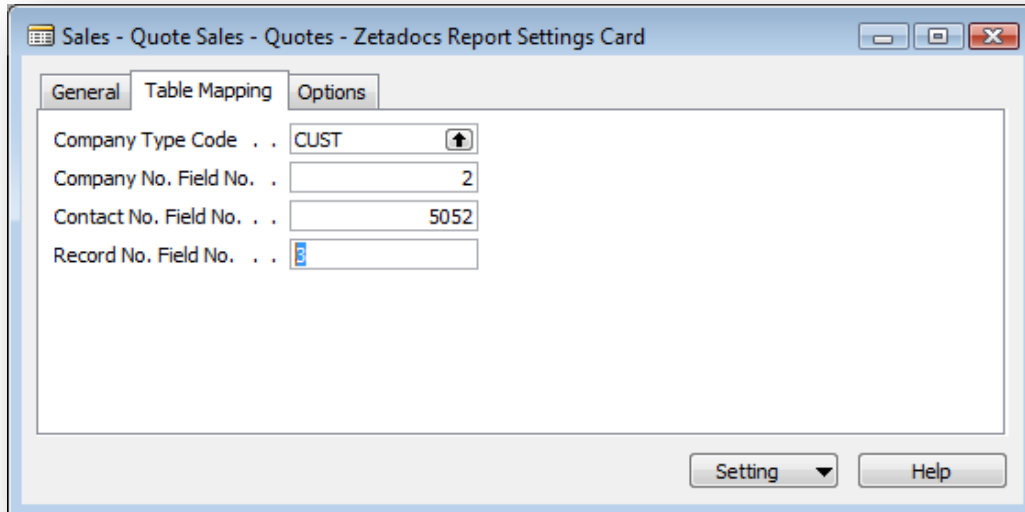
Figure 29 - Zetadocs Report Settings Card – Table Mapping Tab

Table Mapping Tab

- **Company Type Code**: This specifies a table relation between the report record and the recipient. For example, the standard Sales Quote report is to be sent to a Customer. Therefore, we select 'CUST' for the Company Type Code from the Company Type Code List.
- **Company No. Field No.**: Specifies the field no. of the field in the table the report is based on where the Company No. should be taken from. For example, the standard Sales Quote report is based on the Sales Header table. The Customer No. in the Sales Header table is the field "Sell-to Customer No." field no. 2.
- **Contact No. Field No.**: Specifies the field no. of the field in the table the report is based on where the Contact No. should be taken from. For example, the standard Sales Quote report is based on the Sales Header table. The Contact No. in the Sales Header table is field "Sell-to Contact No." field no. 5052.
- **Record No. Field No.**: Specifies the field no. of the field in the table the report is based on where the records No. should be taken from. This can be used as a dynamic field for writing the record no. into a template message as a reference to the recipient and also as a searchable field in the Zetadocs SharePoint archive.

Figure 30 - Zetadocs Report Settings Card – Options Tab

Options Tab
- **Show Delivery Dialog**: Controls the display of the delivery dialogs which allow run-time user overriding of send results.
- **Show Batch Delivery Dialog**: Controls the display of the delivery dialog which allows the user to view and fix any send result errors.
- **Preview in Zetadocs Client**: Controls the default value of previewing the Zetadocs documents in the Zetadocs Client before sending. If the delivery dialog is shown the default can be overridden by the user.
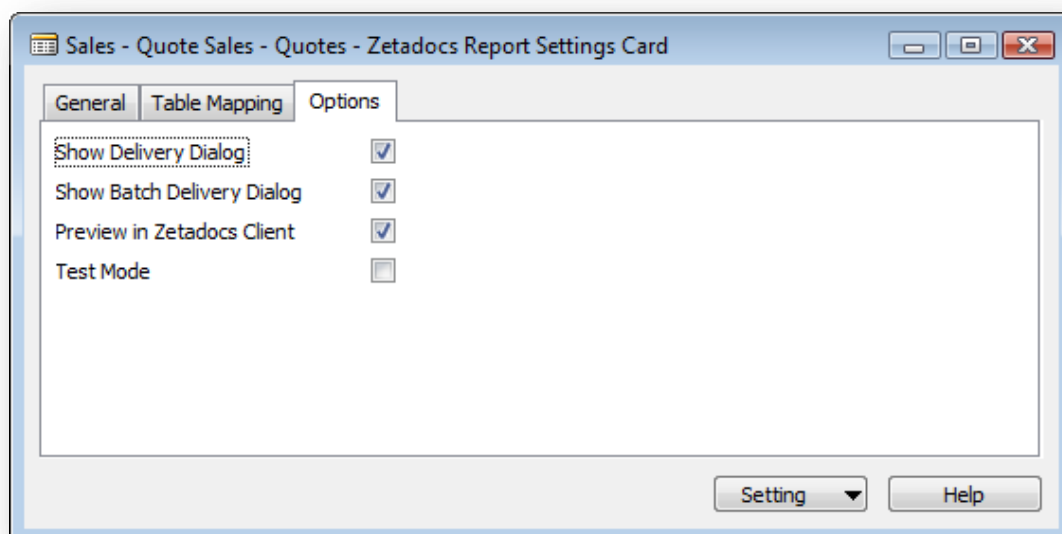- **Test Mode**: This field allows the administrator to prevent the report from printing the report results to Zetadocs. It is useful when troubleshooting problems on a live system. When the report is run it will run as normal up to the point of printing the report documents to Zetadocs.

10.8 Zetadocs System and Company Rules

The Zetadocs System Rules were explained earlier as the ability to define how a message being sent is delivered (Email, Fax or Hard-Copy), how it is formatted (Zetadocs Templates), from which address the message is sent and where it is archived. By now you should realize each Zetadocs Document Set can have a separate definition of these sending settings.

Zetadocs for NAV also has Company Rules, these are the Zetadocs Customer Rules and the Zetadocs Vendor Rules which add another level of control. The sending rules are best explained as a set of override rule definitions. It can be viewed as a 4 level system which overrides particular rule settings dependent upon the document set, the company or a combination of both.

LEVELS:

1. The Default Rule
   o Allows you to specify a basic rule that can be used by any Zetadocs enabled report.
2. Per Document Set
   o Allows you to specify more specific settings for Zetadocs enabled documents by type.
3. Per Company
   o All Zetadocs enabled documents being sent to a particular company can have the following rule settings overridden (This includes documents which are being sent using either the Level 1 or a Level 2 rule settings):
      i. The contact information to which the document will be sent
      ii. The method of delivery by which the document will be sent (Email, Fax, Hard-Copy)
4. Per Company, per Document Set
   o All Zetadocs enabled documents being sent to a particular company and that are part of a particular document set can have the following rule settings overridden (this includes documents which are being sent using either the Level 1 or a Level 2 rule settings and has had some settings already overridden by a Level 3 rule settings)
      i. The Zetadocs Template that will be applied to the document
      ii. The contact information to which the document will be sent
      iii. The method of delivery by which the document will be sent (Email, Fax, Hard-Copy)

To visualize this, let's look at an example, in this case the default configuration has been imported using the steps earlier in this section. We will demonstrate scenarios which require the creation of level 2, 3 and 4 rules.

The Level 1 Rule – Default Rule

The Zetadocs System Rule card shows the level 1 rule that will apply to all documents by default unless overridden by a higher level rule. In this case documents are sent using email with the default template. We can also set the archiving options on the Archiving Tab, in this example we will set the system not to archive.
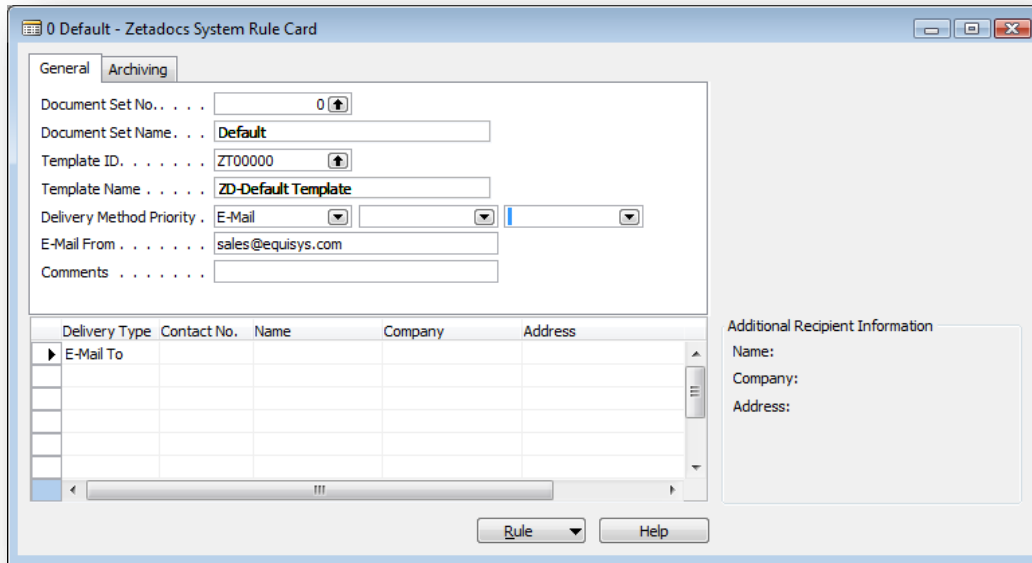
Figure 31 – Level 1 Zetadocs System Rule Card

The Level 2 Rule – per document set

Requirement
The sales team has stated a requirement whereby all order confirmations are sent with a copy of the terms and conditions and use a standard email template.

Solution
Zetadocs templates can be setup to provide all this functionality as described in section 11. Assuming we have created a suitable template or modified one of the Zetadocs templates provided as required. A level 2 rule needs to be setup to ensure this template is applied but only to order confirmations.

- Select the Document Set No. drop down field and choose Order Confirmations.
- The card will populate as shown in the figure below, notice how the ZD-Order Confirmation Template has been assigned as this is configured as part of the standard configuration data imported earlier.

The level 2 rule details shown below will apply to all documents with the document set Order Confirmation, meaning that any Order Confirmation document will be sent using the ZD- Order Confirmation Template whilst the others will use the level 1 rule and thus the default template.

Zetadocs for NAV Installation Guide
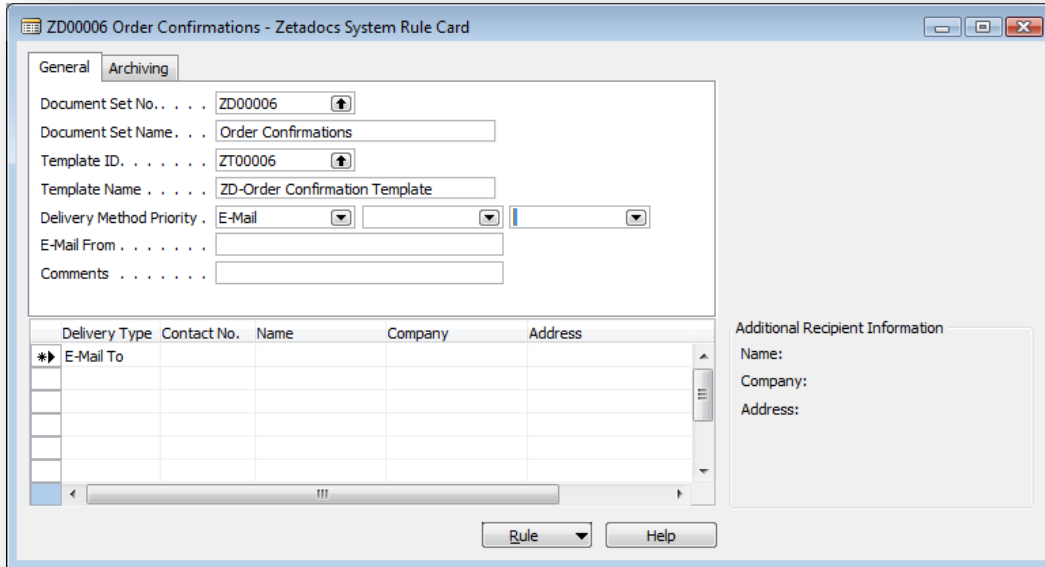
Figure 32 - Level 2 Zetadocs System Rule Card

The Level 3 Rule – per Customer
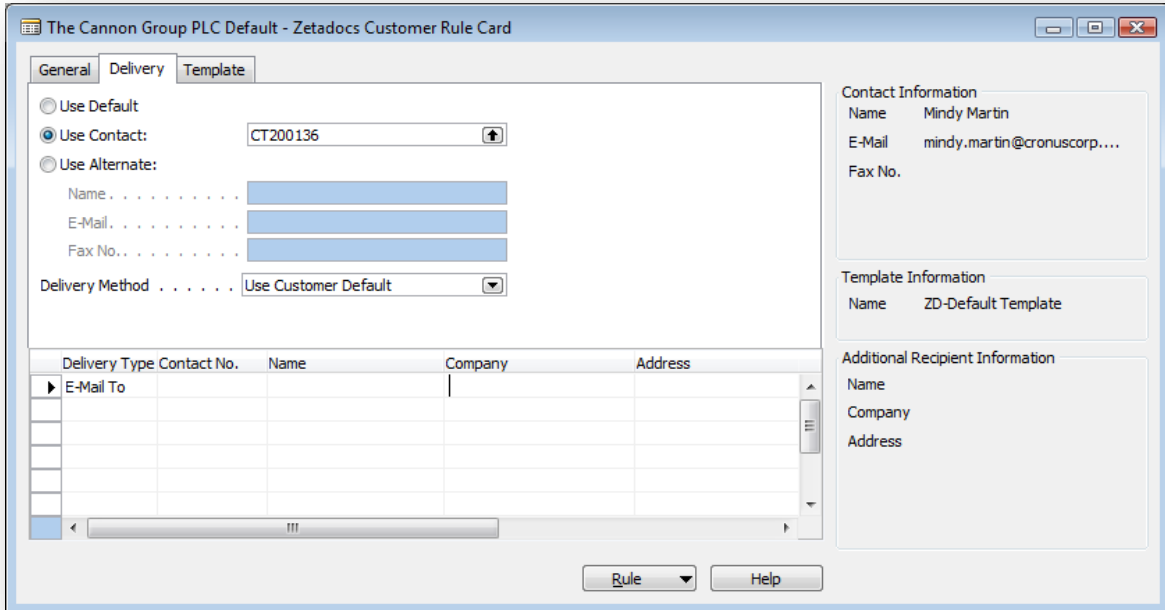
Requirement
Following discussions with one of our customers Cronus Corp, the sales team has requested that all correspondence be sent to Mindy Martin, with the exception of Order Confirmations which should instead go to John Emory by fax.

Solution
We need to make a change which affects all items sent to a particular customer, this is done by creating a level 3 customer rule. We then need to speciy a level 4 rule to cover Order Confirmations.

- Select the **Administration** option in the Navigation pane and then **Application** Setup.
- Open the **Zetadocs Setup →Advanced Settings** section and select the **Zetadocs Customer Rule Card**.
- Select the delivery tab, shown below, and select **Use Contact:** if the new contact is already in your NAV database or **Use Alternate**: if it is not.
- Select or add the details of the recipient, in this case Mindy Martin, as required.
- All documents sent to Cronus corp will use these details.

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Figure 33 - Level 3 rule shown on Customer Rule Card

The Level 4 Rule – per Customer per Document Set

Requirement

The previous level 3 rule will now send all documents to Mindy Martin, but the requirement was for Order Confirmations to go John Emory by fax.

Solution

We need to make a change which affects all items sent using the Document set Order Confirmation and to a particular customer, this is done by creating a level 4.

- Select the **Administration** option in the Navigation pane and then **Application** Setup.
- Open the **Zetadocs Setup** section and select the **Zetadocs System Rule Card**.
- Select the **Document Set No.** field and select **Order Confirmation.**
- Select the delivery tab, shown below, select **Use Contact:** if the new contact is already in your NAV database or **Use Alternate**: if it is not.
- Select or add the details of the recipient, in this case John Emory, as required.
- Select the **Delivery Method** field and select fax.
- You have now created the level 4 rule.
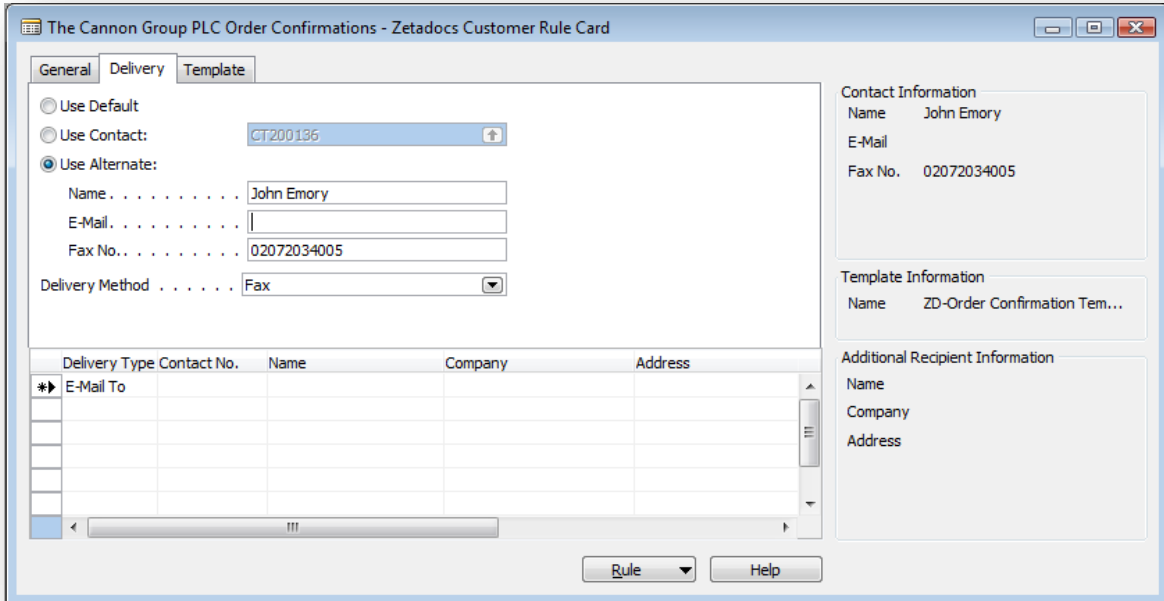
Figure 34 - Level 4 rule shown in the Customer Rule List

Starting from the top then, the internal processing determines the send settings by building the results from the lower level rules up. Assume we are sending an order confirmation and it uses the document set *ZD00006 – Orders Confirmations*.

This will determine the delivery information from the **Level 1 & 2** rules specified above:

- Delivery Method: Email
- Template: ZT00006 - Order
- Archiving Settings: Do not archive
- Contact: *Use Default contact*

When we consult the **Level 3** Rules we see that any document being sent to "The Canon Group PLC" (from the Level 3 figure above) will be sent to "Mindy Martin" instead of the contact specified by default for the company we are sending to.

This would mean:

- Delivery Method: Email
- Template: ZD0000 - Default
- Archiving Settings: Do not archive
- Contact: Mindy Martin

However, the Order Confirmation document has been made part of *ZD00006,* therefore the **Level 4** settings will be applied and it will be sent to John Emory and by fax.

So the final settings will be:

- Delivery Method: Fax
- Template: ZD0006 – Order Confirmation
- Archiving Settings: Do not archive
- Contact: John Emory

Additional Recipients

The additional recipients define in the system and company rules do not override those from the lower level rule as the other settings do. They are additive. If additional recipients are added for a document set (ZD00006 – Order Confirmations for example), any document sent using that document set will be addressed to these additional recipients, along with the additional recipients set at a higher level.

10.9 Zetadocs Capture Essentials Setup

The Zetadocs Capture Essentials components use the Microsoft Dynamics NAV client extensibility functionality to prove embedded controls in NAV RTC pages. Part of the set up of these components involves validating the addin controls for use in NAV. Zetadocs Capture Essentials also makes use of several of the general system settings like archive location but do have some specific settings that require configuration. The following setup steps are required:

Client Addin Validation

- Open the Object Designer in NAV Classic Client. (NOTE: You will most likely require NAV Administrator priviledges to complete these settings)
- Click tables and browse to table 2000000069:Client Add-in.
- Click Run or press Ctrl+R to run the table
- On an empty row enter the following information exactly:
  - **Control Add-in Name:** Equisys.Zetadocs.CaptureControl
  - **Public Key Token:** e139abe62dd951e0
- Close the table

Zetadocs Capture Essentials Settings

- Open NAV and select Administration from the Navigation pane.
- Next choose Zetadocs Setup → Advanced Setting → Zetadocs Sales Capture Setup.
- The form allows you to specify the fields below, these determine how items are archived when dragged and dropped onto the document fast tab.
- Once you have added suitable values repeat the process for the Zetadocs Purch Capture Setup form.

Fields:

Archive Library: Only specify the SharePoint document library name, not the full URL.

Folder Name Structure: Subdivides archived documents into subfolders of the SharePoint document library based on information from the linked record.

        COMPANY – The "ORGANIZATION" metadata value.

        DATE – The Date with a format specified by the "Date Folder Naming" property.

        DOCTYPE – Adds "Document Queue" to the folder structure.

Date Folder Naming: Allows you to specify the format of the date folder structure in the SharePoint archive. E.g. YYYY-MM-DD, DD-MM-YYYY, MM-DD-YYYY etc.

10.10 Setting up User Permissions

To enable the systems users access to the features of Zetadocs they need to have their permissions setup with NAV. Zetadocs comes with two xml files which contain the settings for Zetadocs roles.

- ZETADOCS - grants access to the standard Zetadocs forms and tables and allows you to use and configure Zetadocs for NAV.
- ZETADOCS ADMIN - grants the user the ability to adjust the setup of the system in more fundamental ways and should be reserved to administrators only.

Roles

- Open the Dynamics NAV Classic Client.
- From the navigation pane select Administration → Application Setup → Company Setup → Data Migration.
- The Migration Overview form will appear, select the **Functions** button and then **Import from XML**.
- Go to your product CD or download and browse to the Zetadocs NAV Server Components folder and open the Roles.xml file.
- When the import is complete return to the Migration Overview form, select the **Migration** button and then choose the **Apply Migration Data** option.

Permissions

- Open the Dynamics NAV Classic Client.

- From the navigation pane select Administration → Application Setup → Company Setup → Data Migration.
- The Migration Overview form will appear, select the **Functions** button and then **Import from XML**.
- Go to your product CD or download and browse to the Zetadocs NAV Server Components folder and open the Permissions.xml file.
- When the import is complete return to the Migration Overview form, select the **Migration** button and then choose the **Apply Migration Data** option.

Note: After the "Apply Migration Data" you need to initiate the execution of the synchronization process "Synchronize All Logins".

Setting up Users

Once the standard roles and permissions have been imported you will need to assign roles to your various users. Their additional Zetadocs roles to choose from are:
- ZETADOCS – Standard role for normal Zetadocs for NAV users
- ZETADOCS ADMIN – Administrators role for managing Zetadocs for NAV

To assign a role to a user simply:
- Click Tools → Security → Roles and the Roles window will appear.
- Select the Zetadocs role you want to assign and click the Role button and select the Windows Logins option.
- The Windows Logins window for this role appears, this window lists all of the Windows users and groups that have already been given this role in Microsoft Dynamics NAV.
- To add a Windows user or group to the list, select an empty row.
- In the Login ID field, click the AssistButton and the Windows Logins window appears. This window contains a list of all the Windows users and groups that can log on to Microsoft Dynamics NAV.
- Select the one you want to assign this Zetadocs role to and click OK.
- This user or group will now be added to the list shown in the Windows Logins window for this role.

11. Using Preconfigured Document Templates

Zetadocs for NAV has a number of preconfigured document templates included within it to make setting up a system quicker and easier. These templates contain Zetadocs stationery and a message body which have been deliberately constructed to provide a starting point from which to build and customize your system. Should you wish to construct your own templates instructions on manually creating them are available in the help installed with the Zetadocs Client. You should though find it easier to follow the instructions here to modify the standard templates to your needs.

Note: If you are installing in a language other than English you should first check your templates folder as it should contain a folder with templates specific to your language. Copy these files into the main templates folder replacing the existing English language templates before proceeding with the steps below.

11.1 Preconfigured Document Template Features

The document templates contain Zetadocs stationery and a suitably generic message body reflective of each templates purpose.

Attachments

The document templates come without an attachment included to allow you to include your own company specific documents like terms and conditions that you may wish to distribute.

Stationery

A single stationery file has been provided which by default is applied to all ZD Templates included with your installation. This means you would only be required to update this stationery once for it to apply to all document templates.

Message Body Text

The message body text contains a default message which would form the email message body and subject when the document is sent using Zetadocs for NAV. This allows for the use of dynamics fields to populate information from NAV automatically into the email reducing the time required to process business documents. In the message in section 11.4 you can clearly see several examples of these fields.

Viewing the Template details

To view the Zetadocs for NAV template details simply:

- Open the Zetadocs Client.
- Select the Shared network folder setup earlier containing your templates in the **accessories pane** on the right hand side using the **folder** drop down box shown in figure 3. If the accessories pane is not displayed select the **Accessories** button from the toolbar to display it.
- Ensure the Type drop down box is set to **Templates**.
- Double click on the Template you wish to adjust to open the Document Template Wizard.
- The pages of the wizard cover contain:
    - An Introduction to templates
    - Assignment of attachments
    - Assignment of Stationery
    - Email properties
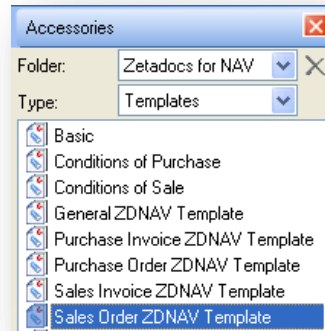   - Template Review and Save

11.2 Template Wizard - Adding an attachment to a template

The preconfigured templates supplied do not come with an attachment included as this would make them unusable 'out of the box' as such if you require attachments to be sent along with your business documents then please follow the steps below.

Any file that you use on a regular basis can be stored as an attachment file for ease of use. These files can be attached to any spooled document prior to sending quickly and easily using the Accessories tool. By specifying an attachment in a template you ensure it is always included when a document is sent using that template with Zetadocs for NAV.

Note: That if your attached file is large this may reduce performance when sending large batches as the attachment would have to be processed for each document delivered. As such we would recommend that you check to ensure that attachments are as efficient in terms of memory required as possible.

To add an attachment simply:

- Copy your desired attachment (e.g. terms and conditions) in pdf format into the shared folder location, likely to be in the form *ServerName*\Zetadocs Templates\
- Open the **Zetadocs Client** and select the template you wish to modify by double clicking on it in the Accessories pane, see Figure 35.
- The template wizard will open, Select **Next** to reach the attachments step of the wizard.
- Select the Shared Network Folder by selecting the **Folder** drop down box.
- Your attachment should appear as one of the attachment options.
- Select the attachment and click the **Add** button.
- Select **Next** to be taken to the stationery template wizard page. If you are happy with the existing settings in the remaining wizard steps skip past them using next and select **Finish** to save your changes.

11.3 Replacing the stationery

The templates comes with stationery included, this single piece of stationery is applied to all of the templates provided. As such by simply replacing this one file you can ensure your stationery is applied to all of the provided templates.

Note: That if your stationery file requires a large amount of memory this may reduce the performance of Zetadocs when sending large batches. This is because it would have to be processed for each page of each document delivered. To reduce the size of this document we would recommend ensuring that any images used are of a suitable format, quality and size. We would also recommend that users avoid scanning their existing paper stationery as this creates large files, it is better instead to isolate and extract any images or required elements before recreating the overall effect using word for example. It should be possible to create stationery of a suitable quality which is around 30kb's in size or less.

Adding company stationery to the Zetadocs client

To add your stationery to the Zetadocs Client simply open your existing company stationery and print it selecting the Zetadocs PDF printer using the steps below.

- Open your stationery in Word or another suitable application. The standard stationery has been provided to you in Word format in the templates folders as well, so you can adjust and print that if desired.
- Select **print** and select **Zetadocs PDF** as your printer.
- This will open the Zetadocs client with your stationery within it.
- Select the **File** menu and then **Save As Stationery.**
- You will then be prompted to provide the name and save location of the stationery, you should select the shared network folder mentioned earlier this is likely to be in the form *ServerName*\Zetadocs Templates\.
- If you wish to apply this stationery to the existing preconfigured templates this file should be named **ZD - Stationery.zds** this will over-right the existing standard stationery and will now be used by all of the templates provided.
- Should you wish to apply this stationery to a single template, name the file as you see fit then open the Zetadocs client.
- Next open the template wizard by double clicking on the template you wish to modify.
- Go to the third page of the wizard using the next button the screen shown in Figure 36 will appear.
- Select your stationery by selecting the Folder drop down box and selecting the Shared Network folder.
- Selecting the existing stationery from the selected stationery window as shown.
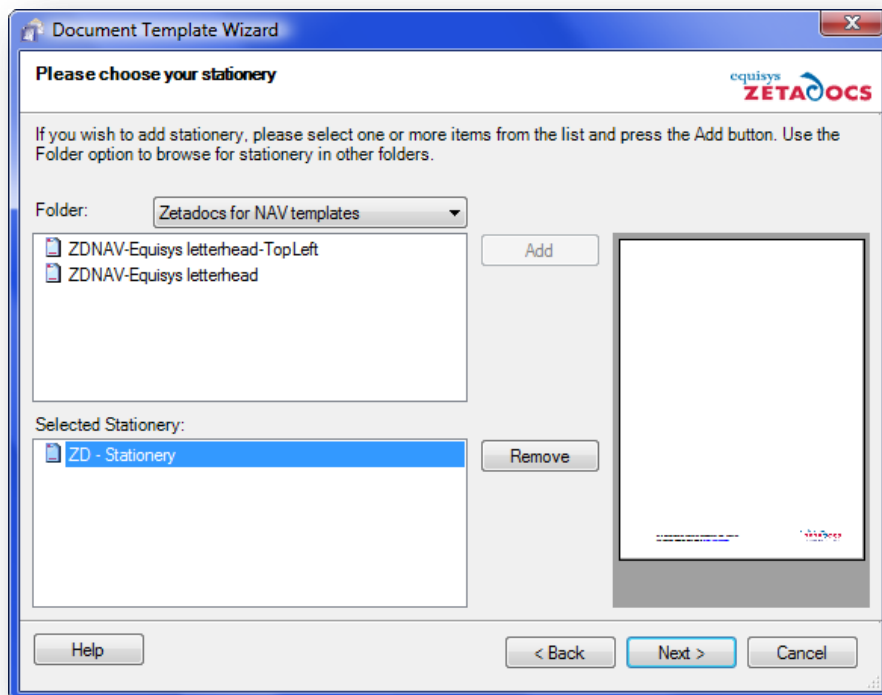
Figure 36 – The Document Template Wizard

- Click the **Remove** button.
- Select your new stationery file and press **Add**.
- Select **Next** to be taken to the email message template wizard page. If you are happy with the existing message select next again and then select **Finish** to save your changes. Note: the class feature is not required for NAV users.

11.4 Adjusting the Email message

The preconfigured templates contain an email message populated with dynamics field data from NAV and static text generically phrased to allow them to be applicable in a number of situations. The messages, like the one shown below, work with NAV to automatically create a personalised message that contains contact details, names, order numbers and organization names.

Messages using Dynamics Fields

Subject: Order Confirmation for order number: %%[ZetadocsRecordNo] for %%[Organization]

Message Body:

FAO: %%[Name]

Dear Customer,
I'm pleased to attach your order confirmation, reference number %%[ZetadocsRecordNo].

Kind regards,

Sales Team

When sent using the Zetadocs for NAV Client these fields are replaced with the corresponding fields from NAV, and would appear thus:

Message with Dynamic Fields Populated

Subject: Order Confirmation for order number: 300381 for Equisys plc

Message Body:

FAO: John Smith

Dear Customer,
I'm pleased to attach your order confirmation, reference number 300381.

Kind regards,

Sales Team

By amending the document template you will be able change the content of every email message sent using that template. It is possible to include a variety of other dynamically populated fields within your email; by default you will have access to the following:

- %%[Name]
- %%[FirstName]
- %%[Surname]
- %%[ZetadocsCompanyNo]
- %%[ZetadocsRecordNo]
- %%[Organization]
- %%[ZetadocsArchiveID]
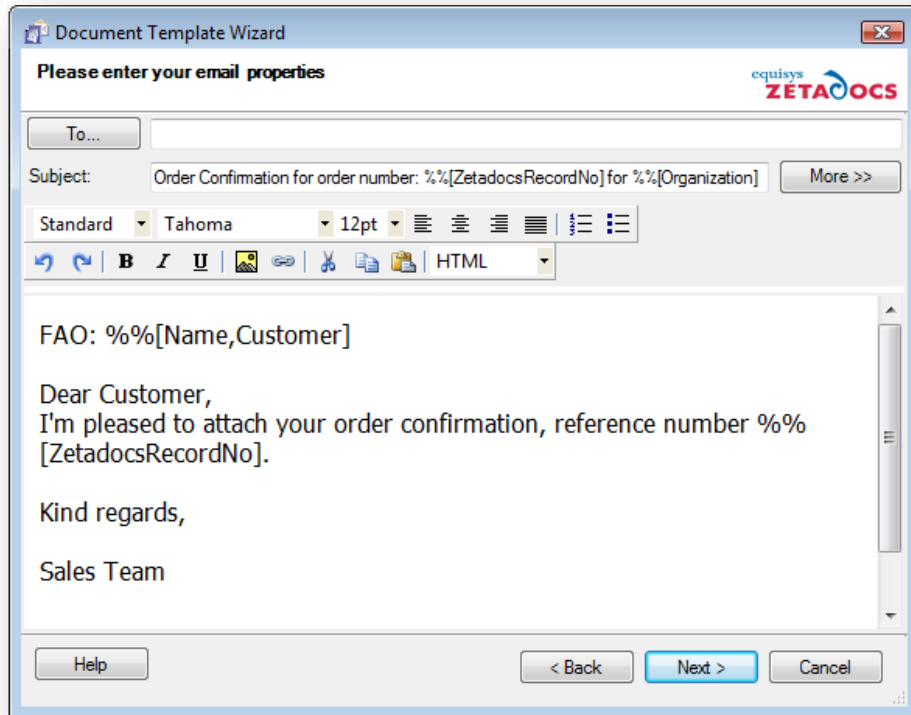
Figure 37 - Document Template Wizard – Email Message Body

It is possible to include other dynamic fields however these require the use of the SDK Granule, this setup will be explored in the Advanced Configuration Guide.

To adjust the email message you need to view the template in the Zetadocs Client using the document template wizard. To open the document template wizard for a particular template follow the steps in section 11.1.

- The first three pages of the wizard contain:
- An introduction to templates
- The assignment of attachments
- The selection of stationery
- Click **Next** on each page to move past these wizard stages until you reach the email properties page (see Figure 36 above).
- Adjust this content to match your needs remembering that the dynamic fields use the format %%[Name] and will be replaced in the message by the corresponding NAV value.
- Click **Next** to review the templates contents and select **Finish** to save your changes.

12. Testing Zetadocs Delivery and Capture Essentials

Now that you have successfully completed the install of the Zetadocs Delivery and Capture Essentials features it is recommended that you test them to ensure that these features operate as expected. For those customers also installing the Delivery Plus or Captures features we would recommend you perform some of these tests to validate your install thus far. Further testing instructions are provided later to cover this extra Advanced functionality following their install.

12.1 Testing Delivery Essentials

Your system should by this stage have the core delivery functionality successfully installed and configured, as well as potentially having some optional archiving features. Instructions on testing both features are below.

Zetadocs for NAV Document Delivery

The test scenarios below will demonstrate how to test delivery of the Sales Order report under a number of different rule configurations.

Zetadocs Rules

Zetadocs enables you to precisely control how your documents are configured using our system of delivery Rules, these work on four levels:
1. The Default Rule – a basic rule that can be used by any Zetadocs enabled report.
2. Per Document Set – specific settings for Zetadocs enabled documents by type.
3. Per Company – specific settings for Zetadocs enabled documents by company.
4. Per Company, per Document Set – specific settings applied to specific document types when sent to a specific company.

For more details on how rules and document delivery work with Zetadocs please see the section 2.4 How Zetadocs Delivers Documents from NAV.

Rule Testing

Rules are created by making modifications to the settings on the Zetadocs Customer/Vendor Rule Cards and the Zetadocs System Rule Card. The standard configuration data will have created a level 1 and 2 rules by default, so edits to these settings can simply be undone by setting the fields to their previous values. However creating level 3 and 4 rules creates an additional level of rules, these need to be removed as usual in NAV by pressing F4 to delete the entry.

Level 2 Rule Test – Single Send

- Select the **Administration** option in the Navigation pane and then **Application** Setup.
- Open the **Zetadocs Setup** section and select the **Zetadocs System Rule Card**.
- Select the document set relevant to the report you are testing, the figure below shows this card, it is used to determine how a document set is to be delivered.
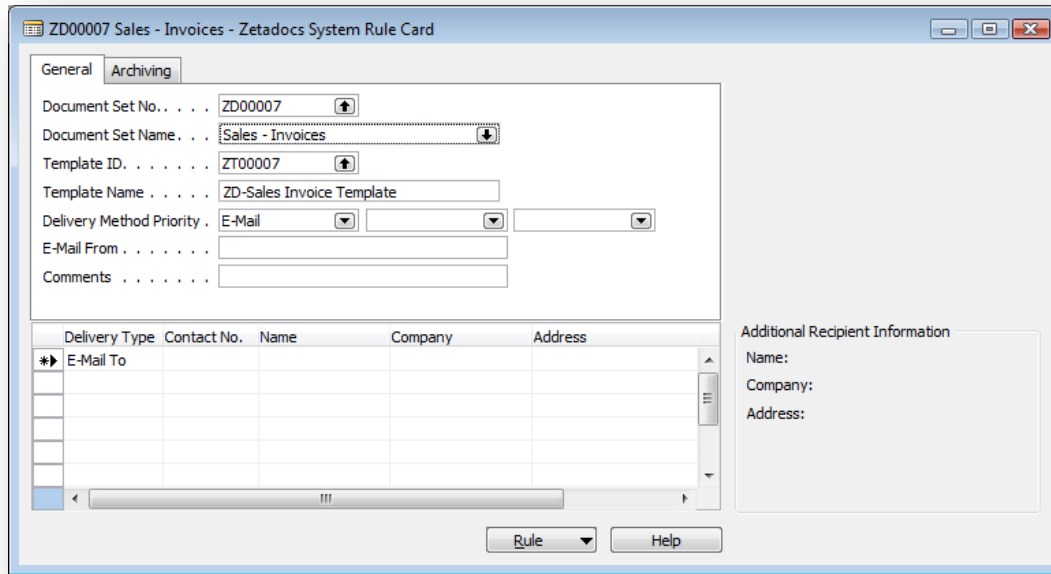
Figure 38 - System Rule Invoice

- Select the **Sales and Marketing** option in the Navigation pane.
- Open the **Order Processing** section and select **Orders.**
- Select a suitable order record and select **Print → Order Confirmation.**
- The usual print dialog will appear, select **Print.**
- The Zetadocs Delivery card may appear (shown below) depending on your system settings, this will contain all of the delivery details according to your current rule setup.
- Select **OK** to send the report, check to ensure it delivers as expected and archives if this has been configured as well.

Note: If you have configured higher level rules for the customer in question these will supersede the level 2 rule.
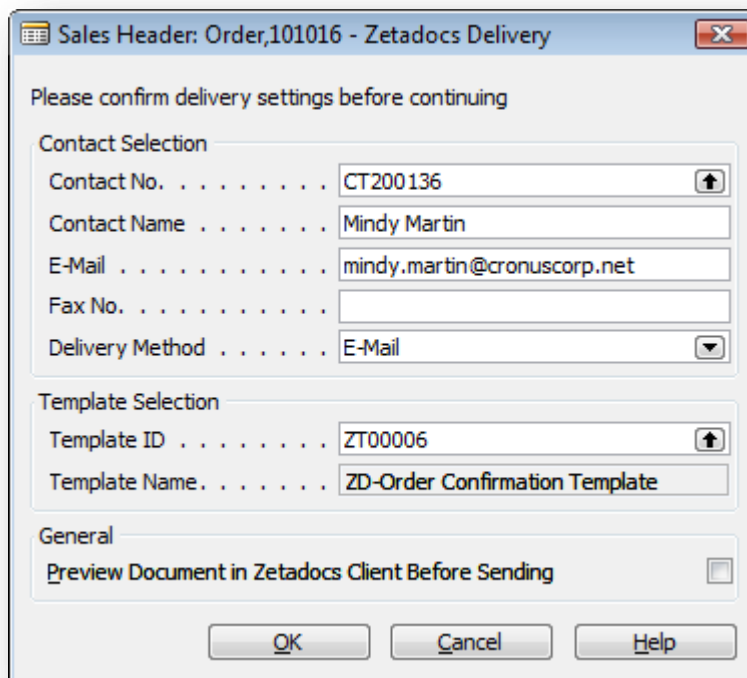
Figure 39 - Zetadocs Delivery Dialog

Level 2 Rule Test – Batch Send
- Open the **Order Processing** section and select **Orders.**
- Select a suitable order record and select **Print → Order Confirmation.**
- Select a suitable rage of records and select **Print → Order Confirmation.**
- The usual print dialog will appear, select **Print.**
- The Zetadocs Batch Delivery card may appear depending on your system settings, this will contain all of the delivery details according to your current rule setup.
- Select **OK** to send the reports, check to ensure they deliver as expected and archive if this has been configured as well.

Note: If you have configured higher level rules for the customers in question these will supersede the level 2 rule.

Modifying the Level 2 Rule
- Return to the **Zetadocs System Rule Card** for the report in question and change the delivery details for that particular document set.
- Repeat the above send tests to ensure that they operate as expected.
- Return any settings to your previous values as determined by your requirements.

Level 3 Rule Test
- Go to the Customer Card and select a customer with an order (or one you are able to create one for).
- Click the **Customer Button** and select **Zetadocs Rules**.
- The **Zetadocs Customer Rule Card** will open.
- Select the **Delivery Tab** and select a sending option other than Use Default and/or change the delivery address (by changing any of those settings on that page you create a Level 3 Rule for that customer).
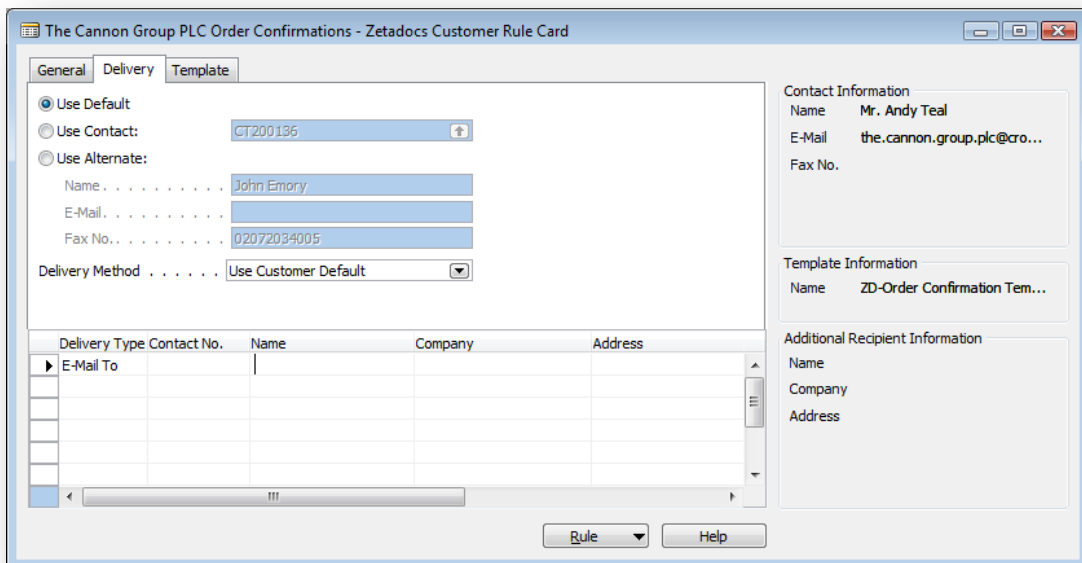
Figure 40 - Customer Card - Zetadocs Tab page

- Send an Order to this customer and check that the NAV document has been delivered as expected.

Modifying the Level 3 Rule
- Return to the **Zetadocs Customer Rule Card** for the customer in question and change the delivery details for them.
- Repeat the above send tests to ensure that they operate using the new rule details as expected.
- Return any settings to your previous values as determined by your requirements.

Level 4 Rule Test

- Go to the Customer Card and select a customer with an order (or one you are able to create one for).
- Click the **Customer Button** and select **Zetadocs Rules**.
- The **Zetadocs Customer Rule Card** will open.
- Set the **Document Set No**. to the document set you wish to modify or create a rule for.
- Modify the settings on the form as desired.
- Print a NAV document and check in the Zetadocs Client that the appropriate settings from that Customer Rule have been applied.

12.2 Testing Optional Delivery Features

You may remember that earlier you were shown a number of steps which would add functionality to a Zetadocs system but which were not required on all setups. Should you have installed any of the features discussed below please ensure you perform the relevant tests to ensure they operate as expected.

NAV Role Tailored Client Compatibility

Those systems which have performed the Role Tailored Client compatibility modifications either manually or by importing the Zetadocs for NAV V4.1 Interfaces - NAVW16.01 (Pages).fob file need to perform the relevant test below to ensure setup has been successful.

- Log into the Role Tailored Client as a user with a role with access to the modified sections within NAV.
- Locate one of the modified forms setup to work with Zetadocs e.g. Sales Order
- Either select an existing document or create a new one and click **Print.**
- Ensure the document is handled as expected and in-line with the earlier delivery tests.

SharePoint Archiving Support

Those systems with SharePoint Archiving configured should already have populated there archive whilst performing the earlier document delivery and rule tests earlier. As such viewing the document library created earlier in section 5 should display those items archived earlier. For those without any existing content in their archive you can modify your system settings using the steps in section 10.4 to enable archiving before repeating any of the earlier document delivery tests.

Adding the Related Documents content to NAV forms

The Documents tab enables Zetadocs to display related documents from your SharePoint archive within the NAV Role Tailored Client.

- Log into the Role Tailored Client as a user with a role with access to the modified sections within NAV.
- Locate one of the modified forms setup to work with Zetadocs e.g. Sales Order
- Open one of the modified forms in NAV and expand the **Documents** tab.
- This will display the Documents fast tab as shown in the figure below.

Figure 41 – Documents Fast Tab

Checking Zetadocs Form and Zetadocs Archive option additions to NAV

You will need to perform this test if you have imported the Zetadocs for NAV V4.1 Interfaces .fob file or performed the equivalent manual steps. The fob file will have added the menu items to the following locations, we would recommend you test a selection of them as a minimum using both the Role Tailored and Classic clients if applicable.

The Zetadocs Archive search menu item can be added to the cards listed in the table below:

Form No.	Form Name
21	Customer Card
26	Vendor Card
41	Sales Quote
42	Sales Order
43	Sales Invoice
44	Sales Credit Memo
507	Blanket Sales Order
6630	Sales Return Order
130	Posted Sales Shipment
132	Posted Sales Invoice
134	Posted Sales Credit Memo
6660	Posted Return Receipt
49	Purchase Quote
50	Purchase Order
51	Purchase Invoice
52	Purchase Credit Memo
509	Blanket Purchase Order
6640	Purchase Return Order
138	Posted Purchase Invoice
6650	Posted Return Shipment
140	Posted Purchase Credit Memo
136	Posted Purchase Receipt

The Zetadocs Rules menu item can be added to the cards listed in the table below:

Form No.	Form Name
21	Customer Card
26	Vendor Card

- Open NAV and choose one of the cards above e.g. the Customer Card.
- Click on the **Customer** button and it will expand revealing a number of options.
- **Zetadocs Archive** and **Zetadocs Rules** should appear at the bottom of this list as shown in the figure below.
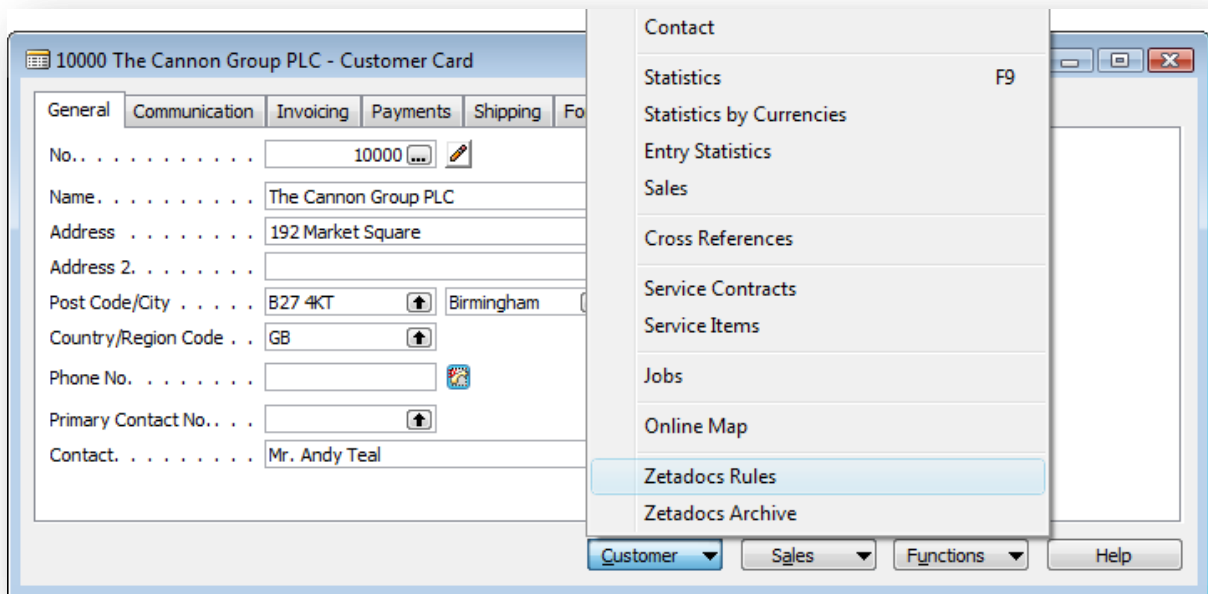
Figure 42 – Customer Card with Zetadocs Rules menu item added

12.3 Testing Capture Essentials Features

If you have installed the Capture Essentials features throughout this guide you will have added a Documents Fast Tab to several of your NAV systems forms in the Role Tailored Client. This will enable you to drag and drop items into your SharePoint Archive linking them to the document currently displayed within NAV. To test that these are operating as expected you need to do the following.

- Log into the Role Tailored Client as a user with a role with access to the modified sections within NAV.
- Locate one of the modified forms setup to work with Zetadocs e.g. Sales Order
- Open one of the modified forms in NAV and expand the **Documents** tab.
- This will display the Documents fast tab as shown in the figure below.

Figure 43 – Documents Fast Tab

- Select an appropriate record within NAV with which to associate a document
- Drag and drop the document to be added to the archive onto the portion of the Documents tab shown below.
- Open the SharePoint archive for the system and search for the original NAV record.
- This should display the document you dragged and dropped into the Documents tab.
- Repeat this with a selection of file types and from location like the Outlook inbox to ensure they function as expected.

Figure 44 – Documents Fast Tab Drag and Drop

12.4 Continuing the Installation

This completes the installation and testing of Zetadocs Delivery and Capture Essentials. If you are not installing any Advanced features your setup is now complete, should you be performing the install on a test setup please proceed to the section migrating to a live environment.

Zetadocs Capture Plus Setup and Configuration

Note: The following sections of the installation guide cover the installation and setup of the features provided as part of the Zetadocs for NAV Capture Plus module. These changes can only be made by those with the Zetadocs SDK and implement features which require Capture Plus module licence from Equisys.

13. Zetadocs Capture Plus

The Zetadocs Capture Plus is an optional component of Zetadocs for Microsoft Dynamics and is required for systems making use of the Document Queue and associated features. At its core is the Zetadocs Server which runs on your server and converts documents placed into a Shared Network folder into PDF/A format. It works with Microsoft Dynamics NAV and enables the document queues to work with a wide range of documents by converting inbound documents into PDF/A. As standard the document queue supports a variety of file types, allowing viewing, processing and eventual archive of these documents to SharePoint.

This provides a number of benefits:
- Documents are stored in a standard storage format (PDF/A)
- Document content is searchable within SharePoint including text which is part of graphics, if OCR is enabled (optional requires additional licence)

By storing all documents within SharePoint you enable a wider range of your company's staff to access these documents despite perhaps not having a copy of the native software for the document. It also means that you have a copy of the document that is an accurate representation of the document when it was received.

The list below covers some of the options available to Capture Plus customers, typically these are used to streamline document handling and management processes.

Capture Plus Features Include:
- Capture and Conversion of inbound documents to PDF/A format
- Custom Document Queues
- Optical Character Recognition
- Barcode Recognition
- On screen approval with workflows
- Document Association

It is easier to understand how these features all come together by looking at a brief example of how they can be used to improve document handling. A company sends out Shipment notes printed from NAV with their deliveries, these are signed by the customer and returned before being processed and filed.

By using Capture Plus you can automate and streamline this process significantly, firstly on printing the Shipment note from NAV, Zetadocs can add a Barcode to the document it is then signed a usual by the customer but on return it is simply scanned. Zetadocs can then recognise the barcode and automatically adds a pdf copy of the document to your archive and associates it with the original order that the Shipment note was based upon. It will then appear in the Shipment Document Queue, this gives the agent processing these documents a single location from where they can view the signed Shipment Note and create and send the corresponding invoice. This provides the organisation with an archive that is populated with related records e.g. a Quote, Order, Shipment Note, Returned Signed Shipment Note, Invoice which enables them to view the whole transaction workflow from SharePoint. We will demonstrate how to setup this Shipment example in the coming pages.

The sample code to achieve this is shipped as part of the Zetadocs-Send Customize codeunit. Additionally we provide a sample Sales Shipment report containing a barcode **9009999 - ZD Sales - Shipment(RTC-Barcode).fob** on the product CD in the folder **\Zetadocs NAV Server Components\W1\6.01.**

13.1 Overview of the Zetadocs Capture Plus Install

Zetadocs Capture Plus is based around the integration of the Zetadocs Server which converts documents with NAV and your other Zetadocs components to provide a range of enhanced functionality. The other functionality is then gained by modifying NAV reports to contain information which Zetadocs can use to automatically process and link documents.

This section will take you through the setup of each of the following:

- Zetadocs Server
- Custom Document Queues
- Barcode support
- Adding Document Queues to a Role Center

To implement some of the features described in this chapter you will need to add a Granule to your license, if you have already installed the Zetadocs Delivery module you may have the required Granule already. If so skip to section 15.

13.2 NAV License

To successfully install Zetadocs for NAV you require a Zetadocs for NAV VAR NFR granule to be added to your license.

Required Granules

To use Zetadocs for NAV you require the Zetadocs for NAV Granule to be added to your license.

VAR – Programming access
Granule 9009961 – Zetadocs Execute Granule

End User – Execute only access
Granule 9009970 – Zetadocs for NAV Granule

Optional Granules

To take advantage of Zetadocs for NAV integration with NAV Contacts you require the Contact Management Granule.
Granule 5500 – Contact Management
Granule 5510 – Contact Management - Basic

Optionally you can also purchase the Zetadocs for NAV SDK Granule which allows the running of customizations made in the Zetadocs Send Customize codeunit 9009962.
Zetadocs Capture Customize codeunit 9009964.

Granule 9009980 – Zetadocs for NAV SDK

14. Zetadocs Server

The Zetadocs Server is simple to install but does require a number of the other steps of the Zetadocs for Microsoft Dynamics installation to have been completed. We recommend that you complete all previous elements of the install you require before attempting to install the Zetadocs Server.

14.1 Zetadocs Server Prerequisites

It is recommended that you perform any Zetadocs for NAV Delivery Essentials module installations first before proceeding with the installation detailed below.

Technical Specifications

Operating systems supported
- Windows Server 2008 R2 (64-bit)
- Windows Server 2008 R2 with Remote Desktop Services
- Windows Server 2008 Standard Edition (32-bit and 64-bit)
- Windows Server 2008 with Windows Terminal Services
- Windows Server 2008 with Citrix Presentation Server 4.5
- Windows Server 2003 Standard Edition (32-bit and 64-bit)
- Windows Server 2003 with Windows Terminal Services
- Windows Server 2003 with Citrix Presentation Server 4.5

Hardware requirements
- It is recommended that systems have a minimum of a Pentium® class CPUs of 1 GHz or higher with 1 GB RAM or more. Should the server be running other applications we would recommend you expand the hardware requirements appropriately for more information on suitable configurations please consult Equisys at support@equisys.com.

Licensing Requirements
- The Zetadocs Server requires the purchase of an additional upgrade.

Note: It is recommended that you install Zetadocs Capture Essentials first if you are installing both modules.

14.2 How the Zetadocs Server works

Conversion
Documents are added to the document queue by placing them in a shared network folder. These are then displayed within the document queue allowing the user to process the document and create associated Dynamics entries and documents. The Zetadocs Server application automatically converts documents placed within the shared network folder into PDF/A whilst storing a copy of the original document in another folder.

PDF Format
The Zetadocs Server converts documents in supported formats into **PDF 1.4 (PDF/A-1a)** format. This is an international ISO standard ISO 19005-1:2005 for more details on this format please see (http://www.pdfa.org/doku.php?id=pdfa:en:pdfa_whitepaper).

OCR
If you choose to include OCR as part of your solution all documents converted to PDF will support full text search. This includes graphics documents or documents that contain graphics (e.g. a PDF with embedded graphics), this requires special processing. To provide this we have the ZD OCR Processor, this is an optional module which incorporates the Abbyy FineReader Engine. The full text that is recognised is added to the created PDF file as a text layer, this enables full text search.

Supported Inbound File Formats
The following file formats are supported, how they are processed depends on whether the ZD OCR Processor has been included:
If the OCR module is installed then the following file types will be processed with OCR:
- PDF (.pdf)

- BMP and DIB (.bmp, .dib)
- PCX and DCX (.pcx, .dcx)
- JPEG, JIFF (.jpg, .jpeg, .jpe, .jfif)
- GIF (.gif)
- TIFF (.tif, .tiff, .g3n, .g3f)
- DjVu (.djvu, .djv)

If the ZD OCR Processor is not included files will be passed for conversion without being OCR'd, we support the following file types:

- Office files (v2003 and v2007) – Word and Excel (.doc, .docx, .xls, .xlsx)
- Rich text files (.rtf)
- Web pages (.html, .htm)
- Text files (.txt)
- Email messages (.msg format is recommended as htm format doesn't include attachments)

Email message conversion of .msg files results in conversion of the email message body text and the unpacking and conversion of any supported attachments. Should any of the attachments not be in a supported format then the whole message will be flagged as having failed to convert so the user can review it in its original format.

The following file types are not supported:

- Compression: Zip, Rar, ARJ, TAR, TGZ, CAB …
- Media: MP3, WMV, AVI, MPG, MPEG, MP4, WAV…
- Executable types: EXE, DLL, BAT, VBS …

Multipart Files
The Document Converter supports multipart files e.g. an email with an attached purchase order, this is then converted into a pdf file with two or more pages with bookmarks to indicate where the various elements of the message are contained. In the above example you would be presented with a first page containing the email subject line, body text, addressing information and email message.

- The following Email metadata is also retained:
- Sent – time/date
- Received – time/date
- From
- To
- CC
- Priority

Next would follow the attachments, each with its own separate bookmark within the pdf.

Note: Hosting the document queue folders on a separate machine to the one the Zetadocs Server is running on is not supported.

14.3 Installing the Zetadocs Server
To install the Zetadocs Server simply:

- Log in with Administrator rights and deactivate the User Account Control (UAC), click here for details on doing this.
- Run the Zetadocs for Microsoft Dynamics software CD or software download.
- Select the install option for your product version from the main menu.
- Then select the Zetadocs Server option.

Figure 45 – Zetadocs Server Install

- Select **Install Zetadocs Server** to start the Installation Wizard.
- Once the Installation Wizard for Zetadocs Server starts click **Next**.
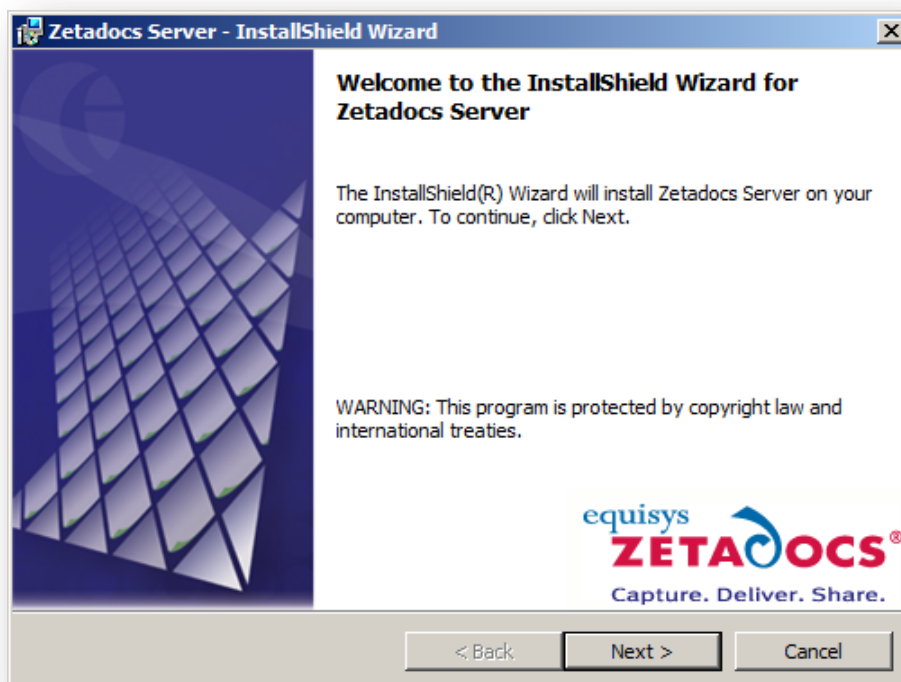
Figure 46 – Zetadocs Server Install

- You will be asked to choose a destination folder for the installation, when satisfied click **Next**.

14.4 Installing OCR Support

- Next you will be asked to **Choose whether you want to include OCR support,** to include the ZD OCR Processor you are required to have a valid licence.
- Choose the relevant option for your install:
- I have an Abbyy licence and would like OCR support.

- I do not have an Abbyy licence number.
- Click **Next,** if you have included Abbyy OCR you will be asked to review their licence agreement.
- Once you have reviewed and selected **I Agree,** click **Next**.
- The Installation Wizard is now ready to install the Zetadocs Server, select **Install** to continue.
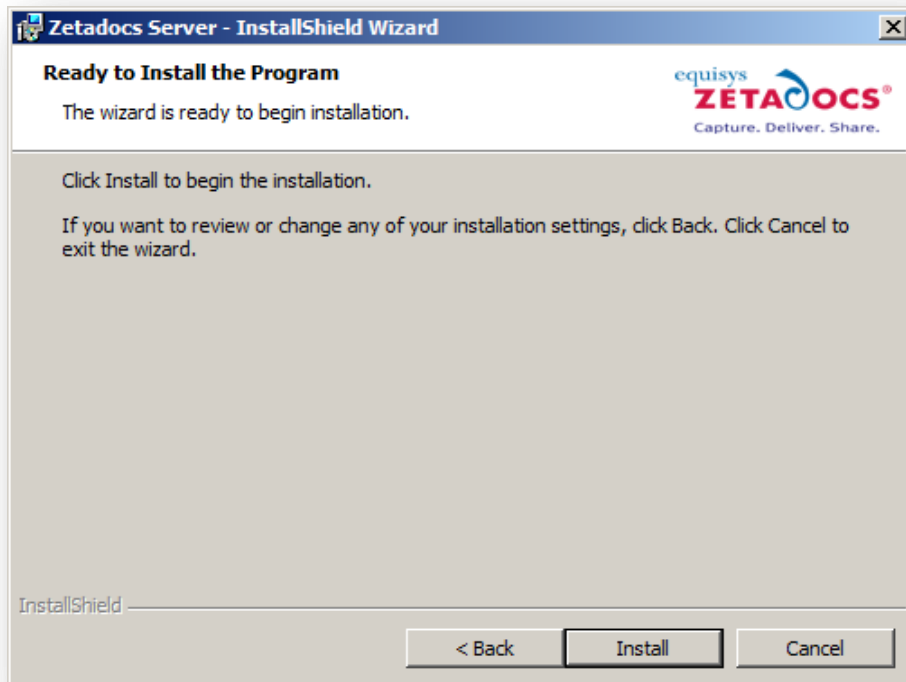
Figure 47 - Start Installation Program

- Once the Installation is complete select **Finish**.

14.5 Licensing Abbyy FineReader

- If you earlier specified that you wished to include Abbyy OCR support then you now need to license the Abbyy FineReader Engine.
- The Abbyy License Manager will open automatically.
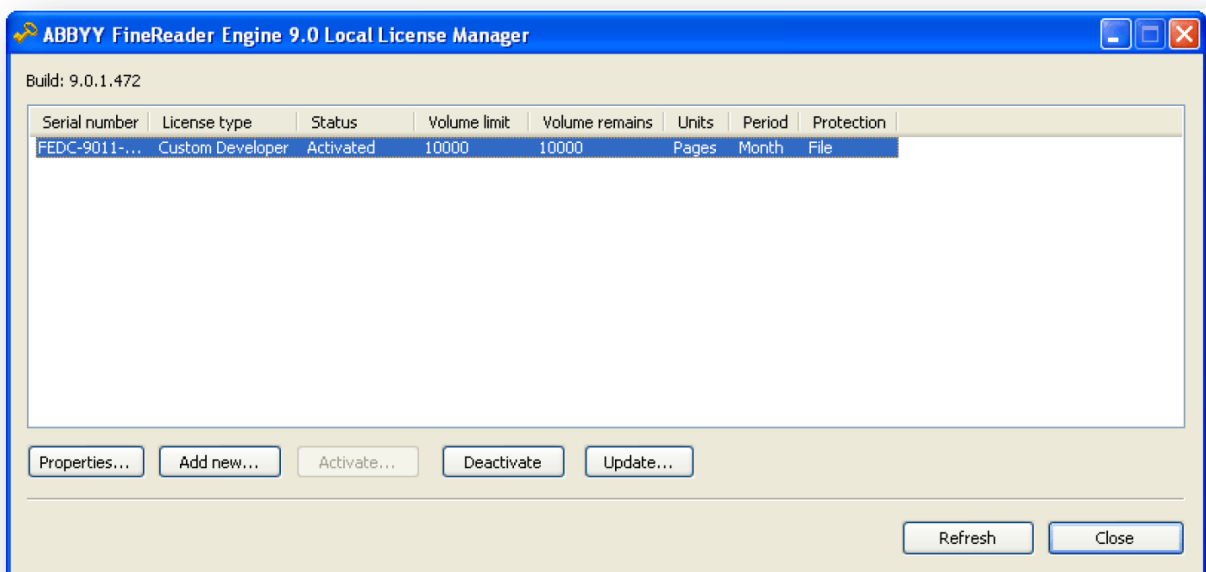
Figure 48 - Abbyy FineReader License Manager

- Click the **Add new…** button and then add your Abbyy license number and click **Add.**
- The Abbyy FineReader Activation Wizard will appear for you to activate your product.

Activation methods:

- **Via the Internet -** Activation is carried out automatically and takes only a few seconds. An Internet connection is required for this type of activation.

- **By e–mail -** The user needs to send an e–mail message generated by the program and containing information required for activation. To ensure a quick reply from the mail robot, do not alter the information in the message body or Subject field.

Once activated Abbyy should be ready to work with the Zetadocs Server.

14.6 Restarting the Zetadocs Server

Once you have detailed the location of the Zetadocs Server you need to restart the conversion service.

- Go to Start→Run, then enter Services.msc
- When the window opens scroll down to **Zetadocs Document Converter** and right click on it and select **Restart**.
- This will restart the service and enable you to begin document conversion.

14.7 Configuring the Zetadocs Server

The Zetadocs server has a number of options which allow you to specify a series of options on how it handles documents, these are:

- Document Queue location
- PDF Quality
- Abbyy enabling
- Stellent Bypass PDF
- Log Level
- Log location

Specifying the Document Queue Locations

The Zetadocs document queues are where converted documents are stored, these queues have yet to be configured in NAV. As such we recommend that you leave the document queue location setup until you have successfully created your queues in the next chapter.

Adjusting the PDF Quality

The quality of the pdf's the Zetadocs Server produces during conversion can be adjusted to meet your requirements of file size, quality and conversion speed.
The options are:
- Better
- Smaller

To adjust the quality of the pdf files produced simply change the value shown here to one of the following options:
<PDFQuality>Better</PDFQuality>
<PDFQuality>Smaller</PDFQuality>

Save the updated Config.xml file when finished modifying the file.

Enabling and Disabling Abbyy

In some circumstances it may be necessary to deactivate Abbyy for example if you were approaching the end of your licensed document limit and wished to save the remaining capacity for a specific group of work. To deactivate Abbyy simply change the entry to **false**, similarly to reactivate it change the value to **true**. Note: true and false are case sensitive.

  <EnableAbbyy>true</EnableAbbyy>
  <EnableAbbyy>false</EnableAbbyy>

Save the updated Config.xml file when finished modifying the file.

Adjusting the StellentBypassPDF option

If you are not using OCR in your system then there is obviously little point in converting PDF's that you receive as there will be no benefit. As such by having this value set to true you instruct the Zetadocs Server not to convert pdf's if you are not using OCR. Note: true and false are case sensitive.

<StellentBypassPDF>true</StellentBypassPDF>

Adjusting the Logging Level

The logging level options are as follows:

- Error
- Warning
- Debug

As such simply change the value in the config.xml file to either of these.

<LogLevel>Error</LogLevel>
<LogLevel>Warning</LogLevel>
<LogLevel>Debug</LogLevel>

Save the updated Config.xml file when finished modifying the file.

Specifying the Log Location

The Zetadocs Server log can be set to save to a file and/or the event log, change these values to true and false as appropriate. Note: true and false are case sensitive.

<LogToFile>true</LogToFile>
<LogToEventLog>false</LogToEventLog>

Save the updated Config.xml file when finished modifying the file.

Enabling Barcode Detection

Zetadocs can detect barcodes if the OCR module has been installed, this option determines whether the Zetadocs Server searches for readable barcodes or not. Note: true and false are case sensitive.

<EnableBarcodeDetection>true</EnableBarcodeDetection>
<EnableBarcodeDetection>false</EnableBarcodeDetection>

Save the updated Config.xml file when finished modifying the file.

15. Zetadocs Document Queues

Zetadocs comes with two Document Queues setup a standard, a Sales and a Purchase Document Queue. These come with a number of pre-programmed menu items which allow you to perform a variety of actions from them. They are designed to cover a variety of standard Sales and Purchase scenarios. In this section we will take you through how to setup the Sales and Purchase Document Queues and how to create new document queues. It will include all the modifications required for the NAV tables and forms needed to ensure they function correctly.

15.1 The Sales and Purchase Document Queues

Zetadocs comes with two existing document queues which have been created with the archiving and link items pre-programmed, this offers you a quick and easy document queue solution. The queues come with the following menu items setup:

Sales Document Queue	Purchase Document Queue
Create new blanket order	Create new blanket order
Create new credit memo	Create new credit memo
Create new invoice	Create new invoice
Create new order	Create new order
Create new quote	Create new quote
Create new return order	Create new return order
Link to existing blanket order	Link to existing blanket order
Link to existing credit memo	Link to existing credit memo
Link to existing invoice	Link to existing invoice
Link to existing order	Link to existing order
Link to existing posted credit memo	Link to existing posted credit memo
Link to existing posted invoice	Link to existing posted invoice
Link to existing posted return receipt	Link to existing posted receipt
Link to existing posted shipment	Link to existing posted return shipment
Link to existing quote	Link to existing quote
Link to existing return order	Link to existing return order

These queues we imported as part of your install earlier, as such you only need to perform action 1, 2, 3 and 6, the two additional steps relate to Custom Queue Setup unless you are intending to modify the Sales and Purchase Document Queues with additional functionality.

- Create a shared network folder for the document queue
- Configure the Zetadocs Server to process files in the document queue
- Setting the Zetadocs Document Queue Settings
- Add Zetadocs Archive ID field to record tables (Custom Queue Setup Only)
- Modify record forms for archive search and retrieval (Custom Queue Setup Only)
- Adding the Document Queues to your Menusuite

The following sections provide more details on Queue setup using our Shipment note example from earlier.

15.2 Create a shared network folder

The document queue requires a network folder into which captured documents are placed and to which all users of the queue have full access permissions.

- Find a suitable location within your network for the central storage of your document queue items. This should be accessible by all intended users of the system.
- Create the folders e.g. Shipment Document Queue
- Right click on the folder and select **Properties**.
- Choose the **Sharing tab**.
- Check the **Share this Folder** radio button.
- Select the **Permissions** button.
- Assign the Permissions necessary to enable your system and users to be able to access these locations.
- USERS: A user of the queue must be added to the share permissions with a minimum of Change

and Read Permissions. Full Permissions are recommended.
- SERVICE: The Zetadocs DIRMonitor Service must have access to the queue folders. To do this add FULL Permissions to the SYSTEM user or whatever network user the service is running as.

15.3 Configure the Zetadocs Server

To enable the Zetadocs Server to convert documents placed into the Document Queue folders you need to point the conversion service to them.
To do this you need to:
- Stop the Zetadocs Server
- Edit the configuration file
- Restart the Zetadocs Server

Stop the Zetadocs server:
- Go to Start→Run, then enter Services.msc
- When the window opens, scroll down to **Zetadocs Document Converter** and right click on it and select **Stop**.

Edit the configuration file:
- Open the Config.xml file in Notepad or a suitable text editor. The file is located at C:\Program Files\Zetadocs Server\Document Converter\Config.xml. The following file will be displayed:

```xml
<?xml version="1.0" encoding="utf-8"?>
<Config xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema">
  <docsQueue>
    <DocsQ Description="Sales Document Queue" Location="\\ServerName\Sales Document Queue\" />
<EnablePDFTextExtractionToFile>false</EnablePDFTextExtractionToFile>
    <DocsQ Description="Purchase Document Queue" Location="\\ServerName\Purchase Document Queue\" />
<EnablePDFTextExtractionToFile>false</EnablePDFTextExtractionToFile>
  </docsQueue>
  <PDFQuality>Better</PDFQuality>
  <EnableAbbyy>true</EnableAbbyy>
  <StellentTimeOut>10</StellentTimeOut>
  <StellentBypassPDF>true</StellentBypassPDF>
  <LogLevel>Error</LogLevel>
  <LogToFile>true</LogToFile>
  <LogToEventLog>false</LogToEventLog>
  <EnableBarcodeDetection>true</EnableBarcodeDetection>
</Config>
```

- You need to add a line to the file in the section <docsQueue> that details the name and location of each document queue you wish to setup.
- Adjust this to include the location you have selected for your Document Queues e.g. \\zdnav-serv\Shipment Document Queue\.

```xml
<docsQueue>
  <DocsQ Description="Sales Document Queue" Location="\\zdnav-serv\Sales Document Queue\"/>
  <DocsQ Description="Purchase Document Queue" Location="\\zdnav-serv\Purchase Document Queue\"/>
  <DocsQ Description="Shipment Document Queue" Location="\\zdnav-serv\Shipment Document Queue\"/>
</docsQueue>
```

- Save the updated Config.xml file when you have finished modifying the file.

Once you have edited the configuration file you need to restart the conversion service:
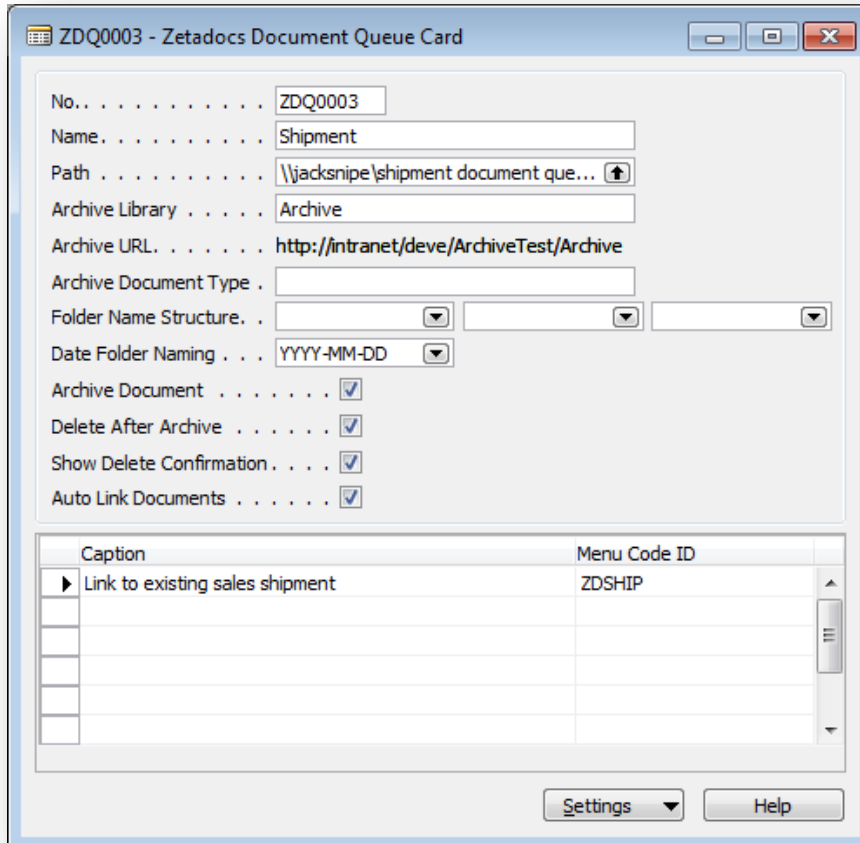
- Go to Start→Run, then enter Services.msc
- When the window opens scroll down to **Zetadocs Document Converter** and right click on it and select **Start**.
- This will restart the service and enable you to begin document conversion.

15.4 Setting Document Queue Settings

The Zetadocs Document Queue card is where all Zetadocs Document Queue settings are defined. It already contains the default settings imported earlier for the Sales and Purchase Document Queues, revise these as required following the steps below. To add a new queue simply create another record on this card and fill it out appropriately.

To open the card:
- Open NAV and select the **Administration** option from the Navigation Pane.
- Navigate to Application Setup→Zetadocs Setup→Advanced Settings→Zetadocs Document Queue Setup.

Figure 49 - Zetadocs Document Queue Card

- **No.:** The document Queue ID.
- **Name:** The name of the Document Queue.
- **Path:** The location of the document queue folder you created e.g. \\zdnav-serv\Shipment Document Queue\
- **Archive Library**: Only specify the SharePoint document library name, not the full URL.
- **Archive URL**: Displays the full target archive library path.
- **Archive Document Type**: The SharePoint content type to be used when archiving documents in this queue.
- **Folder Name Structure**: Subdivides archived documents into subfolders of the SharePoint document library based on information from the linked record.
  - **COMPANY** – The "ORGANIZATION" metadata value. See here.
  - **DATE** – The Date with a format specified by the "Date Folder Naming" property.
  - **DOCTYPE** – Adds "Document Queue" to the folder structure.
- **Date Folder Naming:** Allows you to specify the format of the date folder structure in the SharePoint archive. E.g. YYYY-MM-DD, DD-MM-YYYY, MM-DD-YYYY etc.
- **Archive Document**: Indicates if the captured document is to be archived to SharePoint
- **Delete After Archive**: Indicates if the document is to be deleted from the document queue after

successful archive.

- **Show Delete Confirmation**: Indicates if the user is to be asked to confirm deletion from the document queue after successful archive.
- **Auto Link Documents**: Indicates whether the document queue will call the **GetAutoLink** function in the Zetadocs-Send Customize codeunit.

The list at the bottom of the Document Queue card shows the menu items available to the user, when they click the **Archive** button from the Zetadocs Document Queue form. Each menu item selects an action. Through these actions the user can associate (link) the captured document with an existing or new NAV record. You can add one or more actions to the document queue and for each you must give a caption:

- **Caption**: a caption that describes the action to a user e.g. Link to existing shipment
- **Menu Code ID**: the unique ID that identifies the action

To add new actions you need to open the Zetadocs Doc. Queue Actions table from the Object Designer and enter the item. Once an Action has been added, it will be available via the lookup for Menu Code ID. We will detail the steps required to enable the menu item action occur later in this section.

Add Zetadocs Archive ID field to record tables

When Zetadocs archives a captured document to SharePoint it stores the document with metadata. One of the metadata fields used is the Zetadocs Archive ID. This is a unique key (GUID) that allows the captured document to be quickly found and retrieved from SharePoint. In order to do the search and retrieve we need to have a cross reference to the Zetadocs Archive ID and the associated record in NAV. One way to provide this cross-reference is to add a Zetadocs Archive ID field to the table for the NAV records. If this is done, then Zetadocs will fill in the key when it archives the captured document.

For the NAV record that you are associating captured documents with you need to add a new field to the record table. Follow the actions below to do this.

Actions:

- Open the object designer (Shift + F12) and navigate to the record table. For example if you are associating Shipment reports with Sales Shipment records then the Sales Shipment Header table should be opened.
- Add a field called **"Zetadocs Archive ID"** of type **GUID**. You must enter the name exactly as stated. Upper and lower casing must be correct as well as spacing.
- Add permissions to the Zetadocs-Capture Integration and Zetadocs-Capture Customize codeunits to allow them to modify the record table data.

15.5 Modify record forms for archive search and retrieval (Custom Queues Only)

To allow a user to search, retrieve and view captured documents from a NAV record form it is necessary to modify the form to provide a menu item that will do the search. For example the Posted Sales Shipment record form would be modified to add a Zetadocs Archive item on the Shipment menu, as below.
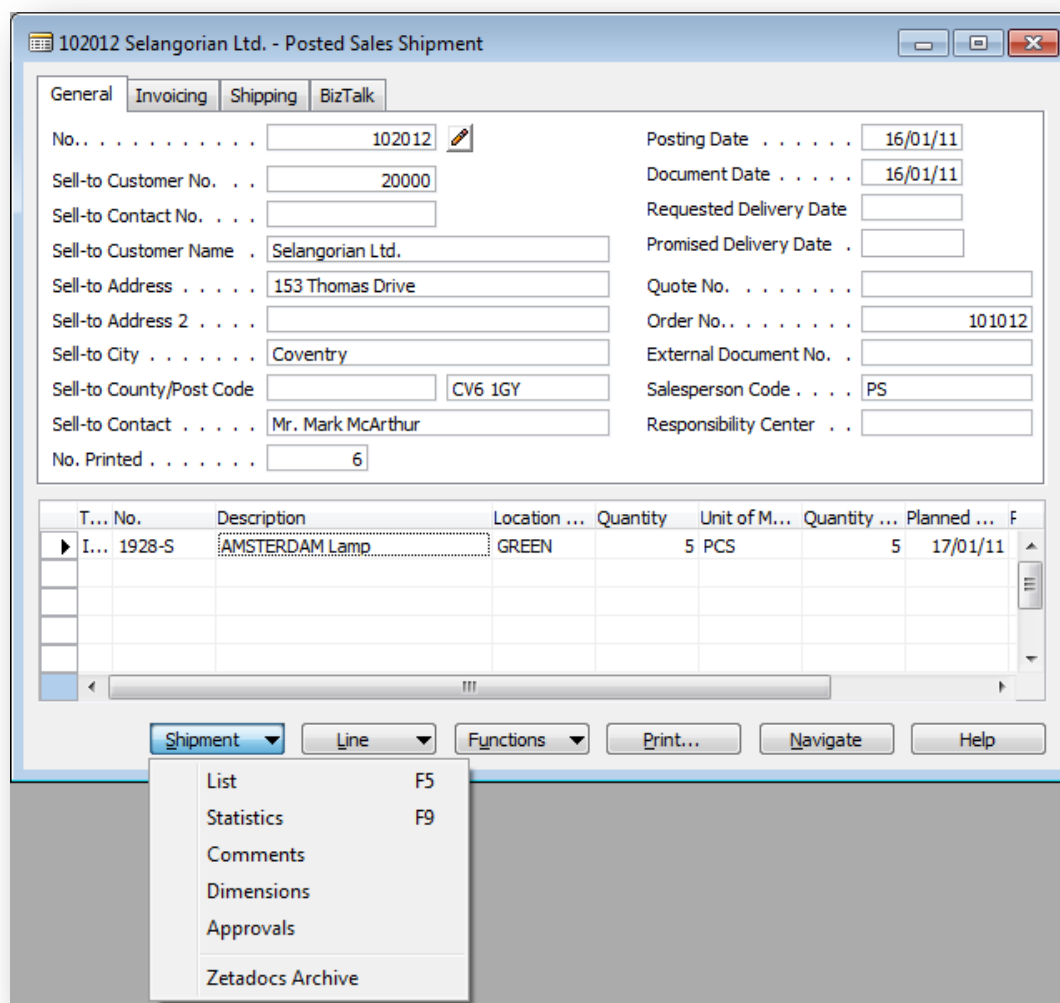
Figure 50 - Posted Sales Shipment form showing Zetadocs Archive menu item

Please follow the instructions below to add a Zetadocs Archive menu option to a record form:

- Open the form in the object designer.
- Add a new menu item to the bottom of the menu with the caption Zetadocs Archive.
- In the OnPush trigger define a local variable called ZetadocsUtilities of type codeunit and sub-type Zetadocs-Utilities.
- Add the following code to the OnPush trigger:
- ZetadocsUtilities.SharePointSearchI('ZDARCHID', "Zetadocs Archive ID", FALSE);
- Once you have saved the form add **EQ4.1** to the Version List column in the Object Designer. Adding this value is essential to ensure easy identification of forms modified for Zetadocs for NAV, in particular, for uninstalling Zetadocs for NAV at a later point.
- Compile the modified form.
- Check that the appropriate menu items have been created by running the form and check the modified menu item is available.

If you are using the Role Tailored Client, then make the equivalent changes in the page editor for the RTC record page.

15.6 Additional code required for document linking and archiving (Custom Queues Only)

Overview

In this section we write the code to enable document linking and archiving. There are a number of functions that Zetadocs calls from the Zetadocs-Capture Customize codeunit that you need to implement. The steps to follow are:

- Write code in the **GetLink** function
- Write code in the **GetAdditionalMetadata** function
- Add permissions to codeunit
- Test document archiving

The following sections provide more detail on each step.

Write code in the GetLink function

For each action that is defined for the Archive button, you need to write some code in the function **GetLink**, to carry out that action in NAV.

For example, if the action is to link the captured document to an existing record, then in this function you would code the lookup that displays a form to allow the user to select the record and then return that RecordID. Zetadocs will then use the record ID during the document archive and add the appropriate cross reference (Zetadocs Archive ID) to the record table.

The **GetLink** function has the following parameters:

Name	Type	Sub-type	Read/Write	Description
ZdArchiveContext	Record	Zetadocs Archive Context	Read	A read only runtime table to provide context information like the queue the item is in and the menu item that was clicked by the user.
ZdLinkResult	Record	Zetadocs Link Result	Read/Write	A writable runtime table to allow you to return the un-typed RecordID reference to a NAV record, error states and messaging.
ZdControlFile	Text [250]		Read	Path to the DQF file for the document queue item (XML file). Provided to allow you to fetch other information about converted files.

Sample Code:

This sample code shows an implementation of the GetLink function allowing the user to select the associated Sales Shipment record. Note that this function will be called for every Action. You will need to add a CASE statement using the Menu Code ID to identify the action the user has selected and write the appropriate code against each case.

```
  PROCEDURE GetLink@1000000007(ZdArchiveContext@1000000000 : Record 9009992;VAR
ZdLinkResult@1000000001 : Record 9009997;ZdControlFile@1000000002 : Text[250]);
  VAR
    SalesShipmentRec@1000000003 : Record 110;
    RecRef@1000000004 : RecordRef;
  BEGIN
    ZdUtilities.Log(0, 'C9009964 - Link');
    // Menu Code ID find out what action to perform

    // if there are any errors during processing set the error flag in ZdLinkResult to TRUE
    // and set the error description field to a useful error message
```

```
    CASE ZdArchiveContext."Menu Code ID" OF
     'ZDSHIP': // link to existing sales shipment
       BEGIN
         // make sure the sales shipment record does not have any filters
         SalesShipmentRec.RESET;
         // run the lookup form and check the result
         IF FORM.RUNMODAL(0, SalesShipmentRec) = ACTION::LookupOK THEN
         BEGIN
           // if the user selected a record use a RecordRef to get the RecordID for the record
           // and modify the ZdLinkResult record to include it
           RecRef.GETTABLE(SalesShipmentRec);
           ZdLinkResult."Record ID" := RecRef.RECORDID;
         END
         ELSE
         BEGIN
           // if the user cancelled, set the cancel flag in ZdLinkResult to true
           ZdLinkResult.Cancel := TRUE;
         END;
         // Call MODIFY to save the changes to the record
         ZdLinkResult.MODIFY;
       END;
     END;
    END;
```

Write code in the GetAdditionalMetadata function

Zetadocs calls the function **GetAdditionalMetadata** to get the values of metadata to be added to SharePoint when the document is archived.

The **GetAdditionalMetadata** function has the following parameters:

Name	Type	Sub-type	Read/Write	Description
ZdArchiveContext	Record	Zetadocs Archive Context	Read	A read only runtime table to provide context information like the queue the item is in and the menu item that was clicked by the user.
ZdLinkResult	Record	Zetadocs Link Result	Read/Write	A writable runtime table to allow you to return the un-typed RecordID reference to a NAV record, error states and messaging.
ZdArchiveMetadata	Record	Zetadocs Archive Metadata	Read/Write	A writable runtime table to allow you to modify the field values being archived to SharePoint and to fill in custom metadata that has multi-level table relations.

Sample Code:

This sample code shows an implementation of GetAdditionalMetadata that sets the values for the metadata for Record Type, Record Number, Company Number, Name and Organization. Note that this function will be called for every Action. You will need to add a CASE statement using the Record ID to identify the linked record and then write the appropriate code against each case to pull the specific metadata required.

```
  PROCEDURE GetAdditionalMetadata@1000000005(ZdArchiveContext@1000000000 : Record
9009992;ZdLinkResult@1000000001 : Record 9009997;VAR ZdArchiveMetadata@1000000002 : Record 9009993);
  VAR
    RecRef@1000000003 : RecordRef;
    fRef@1000000004 : FieldRef;
  BEGIN
```

```
ZdUtilities.Log(0, 'C9009964 - GetAdditionalMetadata');

// Use the record id to get the table number.  From the table number we know which fields to get the metadata from.

// We are using short codes for the standard Zetadocs SharePoint fields.
// These codes will be translated into the correct field names.
// For custom fields just put the full field name in and it will be used.

IF RecRef.GET(ZdLinkResult."Record ID") THEN
BEGIN
  CASE RecRef.NUMBER OF
    110: // Sales Shipment Header Table
    BEGIN
      // First fill in the record type
      ZdArchiveMetadata.INIT;
      ZdArchiveMetadata.Name := 'RECORDTYPE';
      ZdArchiveMetadata.Value := 'Posted Sales Shipment';
      ZdArchiveMetadata.Type := ZdArchiveMetadata.Type::STRING;
      ZdArchiveMetadata.INSERT;

      // Field 3- "No."
      fRef := RecRef.FIELD(3);
      ZdArchiveMetadata.INIT;
      ZdArchiveMetadata.Name := 'RECORDNUMBER';
      ZdArchiveMetadata.Value := fRef.VALUE;
      ZdArchiveMetadata.Type := ZdArchiveMetadata.Type::NUMBER;
      ZdArchiveMetadata.INSERT;

      // Field 2 - "Sell-to Customer No."
      fRef := RecRef.FIELD(2);
      ZdArchiveMetadata.INIT;
      ZdArchiveMetadata.Name := 'COMPANYNUMBER';
      ZdArchiveMetadata.Value := fRef.VALUE;
      ZdArchiveMetadata.Type := ZdArchiveMetadata.Type::STRING;
      ZdArchiveMetadata.INSERT;

      // Field 84 - "Sell-to Contact"
      fRef := RecRef.FIELD(84);
      ZdArchiveMetadata.INIT;
      ZdArchiveMetadata.Name := 'NAME';
      ZdArchiveMetadata.Value := fRef.VALUE;
      ZdArchiveMetadata.Type := ZdArchiveMetadata.Type::STRING;
      ZdArchiveMetadata.INSERT;

      // Field 79 - "Sell-to Customer Name"
      fRef := RecRef.FIELD(79);
      ZdArchiveMetadata.INIT;
      ZdArchiveMetadata.Name := 'ORGANIZATION';
      ZdArchiveMetadata.Value := fRef.VALUE;
      ZdArchiveMetadata.Type := ZdArchiveMetadata.Type::STRING;
      ZdArchiveMetadata.INSERT;
    END;
  END;
 END;
END;
```

Add Permissions to codeunits

It is advisable to add at least modify permissions to the Zetadocs-Capture Customize and the Zetadocs-Capture Integration codeunits for the table data of the records you wish to link to. This allows the codeunits

to set the Zetadocs Archive ID and will enable you to perform other record modifications as part of your custom link actions.

Test document archiving

At this stage you should test that the functionality you have added works by doing the following:

- Scan a document to your new document queue.
- Check that the document is listed in the document queue within NAV and can be viewed correctly.
- With the document selected click the Archive button and complete the actions.
- Browse to the SharePoint library and check that the document has been archived successfully in the correct location.
- View the document properties in SharePoint and check these are as expected.
- Check the Zetadocs Archive option from the record form finds the archived document in SharePoint.
- (Finally, when you have completed your testing delete any test documents from the SharePoint archive.)

15.7 Adding Document Queues to your NAV Menusuite

To enable users to quickly access your document queues you can add them to your menusuite, to do this simply follow the simple steps below.

- Open the object designer within NAV and select the menusuite option.
- Create a new menusuite or edit an existing one as per your requirements.
- If creating a new one select the New button and then select the Design level appropriate to your install, e.g. Company.
- Locate the area in the Navigation pane where you wish to add the item to the menusuite.
- Right click on the area and select Create item.
- Select the object type of Form and pick the document queue in question from the object id field.
- Select OK when satisfied and the use ctrl+shift and the arrow keys to move your new item around the menusuite until you are happy with its location.
- Press ctrl+s to save your changes.
- Repeat for any remaining document queues.

Note: Document Queues will not be available via the menusuite until you have closed and restarted NAV.

15.8 Adding Document Queues to a Role Centre

Overview

The NAV role tailored client is designed around a user's role and each role has its own Role Centre. This is the ideal place to show information about the Zetadocs document queues, as each one is a queue of documents that needs processing.

The following section gives a step by step guide explaining how to show document queue information in the Activities area of the order processor Role Center in the role tailored client. The same steps can be used to display document queue information on any Role Center for any role.

Add document queues to Role Center

The page that you need to modify for this example is number 9060 – SO Processor Activities.

- Add the following global variables:

Name	Data Type	Sub Type
QueueItems	Record	Zetadocs Doc. Queue Item
QueueSettings	Record	Zetadocs Document Queue
ZdDocQueue	Page	Zetadocs Document Queue

- Add the following line of code to the **OnOpenPage** trigger where ZDQ0001 is the ID of the document queue that you want to display the information for:

  QueueItems.SETRANGE(QueueItems."Zetadocs Doc. Queue No.", 'ZDQ0001');

- Add a group to the page with a sub type of "CueGroup". Set the caption to **"Zetadocs Document Queues"**.
- Add a field to the group. Set the caption to "Document Queue" and set the source expression to **"QueueItems.COUNT"** as shown in the screenshot below:
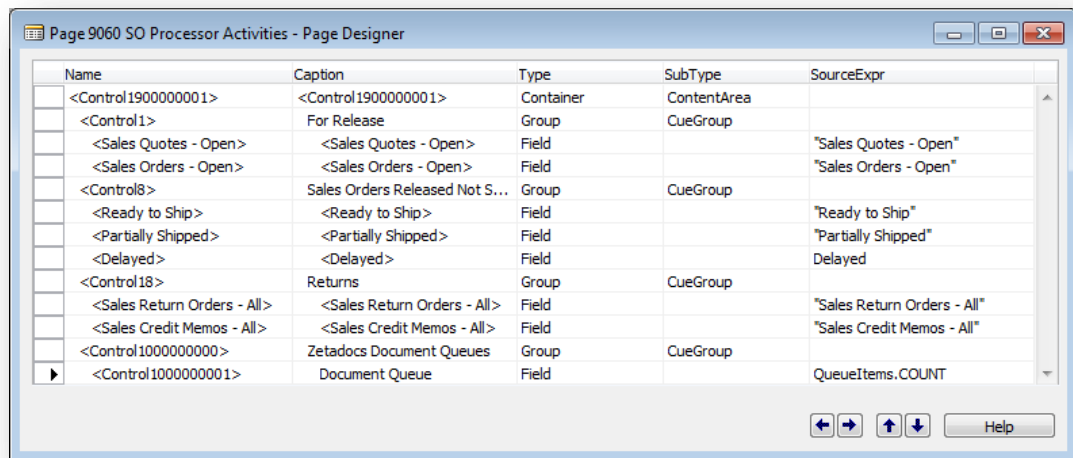
Figure 51 - SO Processor Activities - Page Designer

- Select the new field and press F9 to view code. Add the following code to the **OnDrillDown** trigger:

```
IF QueueSettings.GET('ZDQ0001') THEN
BEGIN
 ZdDocQueue.SetQueueSettings(QueueSettings);
 ZdDocQueue.RUN;
END;
```

The previous steps can be repeated to add any other document queues to the display.

Below is a screenshot showing an example of what this looks like when it is complete:

Figure 52 - Zetadocs Document Queues in the Role Centre

16. Enabling Barcode Support

Zetadocs supports the addition of barcodes to reports printed from NAV using a barcode font to print unique information about an NAV object. This places a barcode into the report output, which can be used in a number of manners. For example, with documents like invoices or sign off sheets which are distributed from NAV before being signed or filled in and returned. In these cases when the document is added back into the system document queue via scanning or email etc, it is cap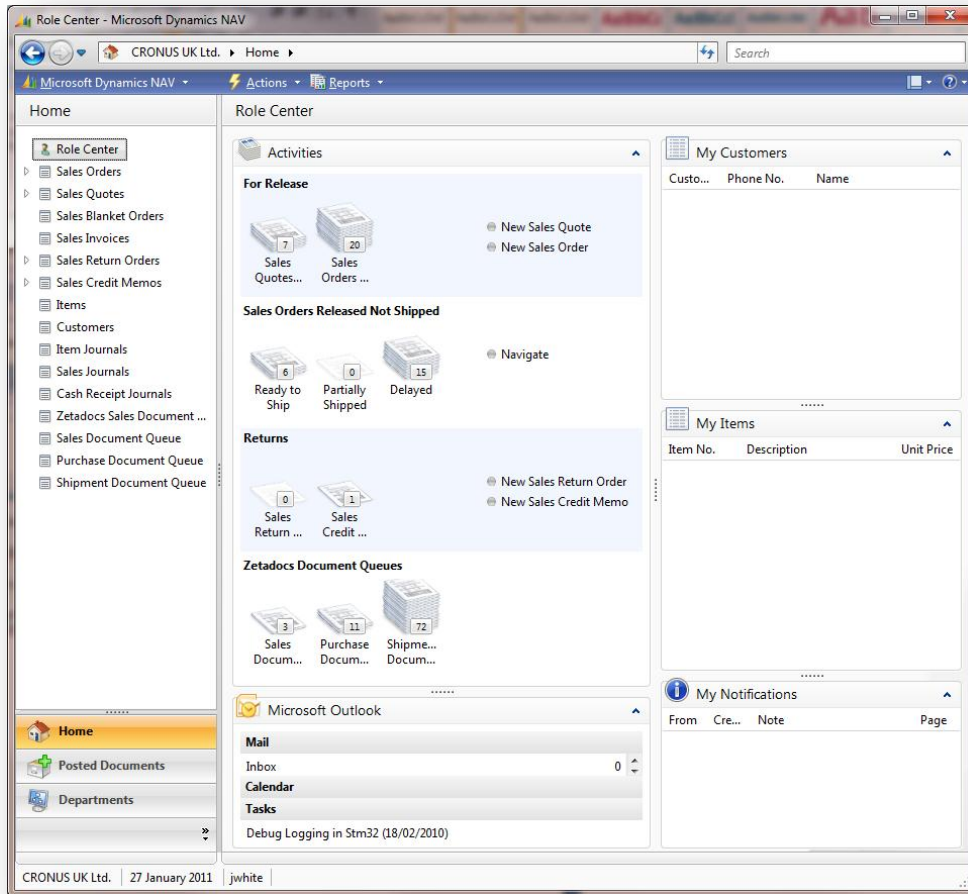tured back into the system and OCR'd. This process detects the barcode and decodes the information contained within it. It is then used to link the returned document to the original document in the archive. This enables users to track documents through a variety of business processes.

Barcode Formats

Zetadocs for NAV has been tested with Code 39 format barcodes only, however the OCR software has the capacity to read and process those listed below.

Numeric-only barcodes

- EAN-13 (European Article Numbering, an international retail product code)
- EAN-8 (compressed version of EAN code for use on small products)
- UPC-A (Universal Product Code seen on almost all retail products in the USA and Canada)
- UPC-E (compressed version of UPC code for use on small products)
- Code 11 (used primarily for labelling telecommunications equipment)
- Interleaved 2 of 5 (compact numeric code, widely used in industry, air cargo, other applications)
- Industrial 2 of 5 (older code not in common use)
- Standard 2 of 5 (older code not in common use)
- Codabar (older code often used in library systems, sometimes in blood banks)
- Plessey (older code commonly used for retail shelf marking)
- MSI (variation of the Plessey code commonly used in USA)
- PostNet (used by U.S. Postal Service for automated mail sorting)

Alphanumeric barcodes

- Code 39 (de facto standard for Government, Manufacturing, BarCode Industry, Education, and Business applications, in use world-wide)
- Code 93 (compact code similar to Code 39)
- Code 128 (very capable code, excellent density, high reliability; in very wide use world-wide)
- LOGMARS (same as Code 39, this is the U.S. Government specification)

Barcode Options

- The Zetadocs server searches for barcode information when processing graphics and PDF image files. Any barcodes which are included in the file are saved alongside the document, and can be used by custom processing functions to identify the document and automate its processing.
- A typical usage is to encode the NAV document number directly – eg adding the shipping note number as a barcode. However for more complex requirements a separate ID could be stored instead – eg storing a lookup key into a custom table within NAV which is used to store custom information about the document. Barcode information is passed transparently to the custom code when processing for maximum flexibility.
- Zetadocs for NAV is supplied with a standard barcode font. When used with this font, the barcode recognition supports the following features:
- Encoding of variable length data strings, including letters A-Z (from ANSI standard Western European character set), digits 0-9, plus a selection of punctuation characters.
- Barcode including text (user readable) version for manual checking or processing.
- Protection against misreading, using automatically generated checksum data.
- Support for documents scanned upside down.
- Most other common barcode formats can also be supported. Please contact Equisys for further details if there is a requirement to use a specific barcode format.

- Barcode processing requires the OCR add-on module.
- Use of the barcode to identify and process the document requires customization work by the VAR using the Zetadocs for NAV Capture SDK, as described below.

Note: This method works for most reports; however, due to the customizable nature of reports it may not fit all reports exactly. Therefore, the location of where to insert the code below may need to vary but the code will remain the same.

Installation Overview

In this section we write the code to enable document auto linking and archiving. You will need to modify the printed report to include a barcode and there are also a number of functions that Zetadocs calls from the Zetadocs-Capture Customize codeunit that you need to implement. The steps to follow are:

- Installing the barcode font
- Modify a report to add a barcode
- Write code in the **GetLinkDisplayString** function
- Write code in the **GetAutoLink** function
- Test document auto linking

The following sections provide more detail on each step.

16.1 Installing the barcode font

Barcodes can be added to reports by simply using a suitable font. The chosen barcode font must be installed on each client PC that will be used to print the report. There are many different types of barcode font available, but we have found that Code 39 barcodes work well with Zetadocs. You can download and install a free Code 39 barcode font from http://www.barcodesinc.com/free-barcode-font/. Choose either the standard or extended font and follow the included instructions to install the font on each client PC. Barcode fonts often have limited character support e.g. A-Z and 0-9. So please ensure that the characters you wish to use are supported by the font.

16.2 Modify an NAV report to add a barcode

Before you modify your report, you need to decide what unique piece of information you will use for the barcode, so that the printed report can subsequently be identified in the capture stage. This will usually be the record number of the NAV record. For example for the Shipment Note report you could use the Shipment record number from the Posted Sales Shipment Record.

Follow these instructions to modify a report to add a barcode:

- Open the NAV classic client and open the Object Designer (Shift+F12).
- Locate the report you wish to modify in the Object Designer and select **Design**.
- In the Report Designer select **View➔Sections**.
- Open the toolbox **View➔Toolbox**.
- Select the text box tool and create one in a suitable location for the barcode - we suggest the main header section.
- Right-click on the text box and select **properties**.
- Set the text box **FontName** to the barcode font name
  e.g. FontName = Free 3 of 9 Extended
- Edit the **FontSize** to a suitable value, we recommend a minimum size of 20.
- Set the text box SourceExpr property to the value to be used for the barcode
  e.g. SourceExpr = STRSUBSTNO('*SHIP%1*',"Sales Shipment Header"."No.")
- Ensure that the barcode starts with and ends with **"*"**, otherwise the barcode will not be recognized by the scanner.
- We also suggest that you add another text box below the barcode to display the value in a standard font so that it is also human readable.
- Save the changes to the report.
- Test that the report prints OK and that the barcode is clearly legible.

If you are using the Role Tailored Client, then make the equivalent changes in the report editor for the RTC report.

16.3 Adding code to the GetLinkDisplayString function

Zetadocs calls the function **GetLinkDisplayString** to allow you to return a suitable text string to be displayed in the document queue form. If no value is returned by this function, then the display will default to the barcode text for the first barcode found in the captured document. If the document contains multiple barcodes, these will be represented as multiple records in the table.

The **GetLinkDisplayString** function has the following parameters:

Parameter	Type	Sub-type	Read/Write	Description
ZdDocQueueBarcodes	Record	Zetadocs Doc. Queue Barcodes	Read	A read only runtime table that allows you to access the values of all barcodes from the document queue item.
Return Value	Text[120]		Write	The text to display in the document queue "Link" column.

- Open the NAV classic client and open the Object Designer (Shift+F12).
- Locate the Codeunit ID:9009964 **Zetadocs-Capture Customise** in the Object Designer and select **Design**.
- Scroll down to the GetLinkDisplayString section.
- You will notice the code matches that displayed below, this indicates that it is setup for the Shipment Report, which we provide as a sample report.
- To add support for other reports we need to add additional if statements to ensure your system is configured to deal with barcodes which start with other details.

Sample Code:
This sample code shows an implementation of GetLinkDisplayString that returns a display string for a Shipment record.

```
// Call reset to clear any filters that may be on the barcodes temporary table
ZdDocQueueItemBarcodes.RESET;

IF NOT ZdDocQueueItemBarcodes.FIND('-') THEN
BEGIN
  // There are no barcodes so we leave the link string blank
  EXIT('');
END;

info := ZdDocQueueItemBarcodes.Value;

// if the barcode starts with SHIP
IF (STRLEN(info) > 4) AND (COPYSTR(info, 1, 4) = 'SHIP') THEN
BEGIN
  info := STRSUBSTNO(strSalesShipment, COPYSTR(info, 5));
END;
END;
```

Customising the GetLinkDisplayString function

The document specific section of code below contains an IF statement which enables the codeunit to add additional information to the document queue when it detects a barcode which begins with SHIP. The makeup of this string is obviously determined by the unique value you wish to use for your barcode.

String in the report which generates the barcode
SourceExpr = STRSUBSTNO('*SHIP%1*',"Sales Shipment Header"."No.")

This would for example generate a value of *SHIP 102028*.

Corresponding code required in the codeunit
// if the barcode starts with SHIP

```
IF (STRLEN(info) > 4) AND (COPYSTR(info, 1, 4) = 'SHIP') THEN
BEGIN
  info := STRSUBSTNO(strSalesShipment, COPYSTR(info, 5));
END;
```

The code then detects that our barcode starts with SHIP and acts accordingly.

Adding additional IF statements for other reports

If then you wanted to add barcode support to another report then you would need to modify the report as per the steps in section 16.2 adding the SourceExpr value shown below. Note you can use whatever identifier seems appropriate in this case we have chosen to setup a Sales Invoice report so have chosen SINV and have replaced Sales Shipment Header for Sales Invoice Header.

```
SourceExpr = STRSUBSTNO('*SINV%1*',"Sales Invoice Header"."No.")
```

We then need to add an additional if statement to match this:

```
// if the barcode starts with SINV
IF (STRLEN(info) > 4) AND (COPYSTR(info, 1, 4) = ' SINV ') THEN
BEGIN
  info := STRSUBSTNO(strSalesInvoice, COPYSTR(info, 5));
END;
```

This can be repeated as desired for any remaining reports.

16.4 Write code in the GetAutoLink function

Zetadocs calls the function **GetAutoLink** for each item in the queue so that you can determine if it can be automatically associated with a NAV record. Details of recognized barcodes are included so that you can write any necessary functionality to lookup the NAV record. If you plan to have this function called automatically from the NAS server or from other codeunits, it is recommended that you do not include user input operations.

The **GetAutoLink** function has the following parameters:

Parameter	Type	Sub-type	Read/Write	Description
ZdArchiveContext	Record	Zetadocs Archive Context	Read	A read only runtime table to provide context information like the queue the item is in and the menu item that was clicked by the user.
ZdDocQueueBarcodes	Record	Zetadocs Doc. Queue Barcodes	Read	A read only runtime table that allows you to access the values of all barcodes from the document queue item.
ZdLinkResult	Record	Zetadocs Link Result	Read/Write	A writable runtime table to allow you to return the un-typed RecordID reference to a NAV record, error states and messaging.
ZdControlFile	Text [250]		Read	Path to the DQF file for the document queue item (XML file). Provided to allow you to fetch other information about converted files.

Sample Code:

This sample code shows an implementation of GetAutoLink that finds and returns the matching record ID.

```
  PROCEDURE GetAutoLink@1000000006(ZdArchiveContext@1000000002 : Record 9009992;VAR
ZdLinkResult@1000000001 : Record 9009997;ZdControlFile@1000000000 : Text[250];VAR
ZdDocQueueBarcodes@1000000003 : Record 9009995);
  VAR
    msgNoBarcodes@1000000005 : TextConst 'DAN=Auto linking failed.  No barcodes were detected on the
document.;DEU=Auto linking failed.  No barcodes were detected on the document.;ENU=Auto linking failed.  No barcodes
were detected on the document.;ESP=Auto linking failed.  No barcodes were detected on the document.;FRA=Auto linking
failed.  No barcodes were detected on the document.;ITA=Auto linking failed.  No barcodes were detected on the
document.;NLD=Auto linking failed.  No barcodes were detected on the document.;ENG=Auto linking failed.  No barcodes
were detected on the document.';
    msgCouldNotFindRecord@1000000006 : TextConst 'DAN=Auto linking failed.  Could not find record matching barcode:
%1;DEU=Auto linking failed.  Could not find record matching barcode: %1;ENU=Auto linking failed.  Could not find record
matching barcode: %1;ESP=Auto linking failed.  Could not find record matching barcode: %1;FRA=Auto linking failed.
Could not find record matching barcode: %1;ITA=Auto linking failed.  Could not find record matching barcode:
%1;NLD=Auto linking failed.  Could not find record matching barcode: %1;ENG=Auto linking failed.  Could not find record
matching barcode: %1';
    barcodeVal@1000000004 : Text[80];
    ShipmentRec@1000000007 : Record 110;
    RecRef@1000000008 : RecordRef;
  BEGIN
    ZdUtilities.Log(0, 'C9009964 - AutoLink');
```

This code should be the same for every report and doesn't need repeating with each if statement.

```
    // Use the barcodes that are passed in to find the record to link to.

    // Call reset to clear any filters that may be on the barcodes temporary table
    ZdDocQueueBarcodes.RESET;

    IF NOT ZdDocQueueBarcodes.FIND('-') THEN
    BEGIN
     // There are no barcodes so don't modify the record.
     // Processing will fall back to calling the Link function for the manual method.
     EXIT;
    END;

    barcodeVal := ZdDocQueueBarcodes.Value;
```

IF Statement

```
 // If the barcode starts with SHIP it means it is a shipment note.
   // The barcode will be in the format SHIP000000, where 000000 is the shipment number
   IF (STRLEN(barcodeVal) > 4) AND (COPYSTR(barcodeVal, 1, 4) = 'SHIP') THEN
   BEGIN
    ShipmentRec.RESET;
    ShipmentRec."No." := COPYSTR(barcodeVal, 5);
    // If we can find the record that the barcode refers to
    IF ShipmentRec.FIND THEN
    BEGIN
     // if the user selected a record use a RecordRef to get the RecordID for the record
     // and modify the ZdLinkResult record to include it
     RecRef.GETTABLE(ShipmentRec);
     ZdLinkResult."Record ID" := RecRef.RECORDID;
     ZdLinkResult.MODIFY;
    END;
   END;

   EXIT;
  END;
```

Modified IF Statement for the Sales Invoice

```
 // If the barcode starts with SINV it means it is a Sales Invoice.
   // The barcode will be in the format SINV000000, where 000000 is the Sales Invoice number
   IF (STRLEN(barcodeVal) > 4) AND (COPYSTR(barcodeVal, 1, 4) = 'SINV') THEN
   BEGIN
     ShipmentRec.RESET;
     ShipmentRec."No." := COPYSTR(barcodeVal, 5);
     // If we can find the record that the barcode refers to
     IF ShipmentRec.FIND THEN
     BEGIN
       // if the user selected a record use a RecordRef to get the RecordID for the record
       // and modify the ZdLinkResult record to include it
       RecRef.GETTABLE(ShipmentRec);
       ZdLinkResult."Record ID" := RecRef.RECORDID;
       ZdLinkResult.MODIFY;
     END;
   END;

   EXIT;
 END;
```

Test document auto linking

At this stage you should test that the functionality you have added works by doing the following:
- Print a modified report that includes a barcode.
- Scan the printed report into your new document queue.
- Check that the document is listed in the document queue within NAV and can be viewed correctly.
- Check that the scanned document displays the appropriate text in the Link column.
- Click the Archive button and complete the actions.
- Browse to the SharePoint library and check that the document has been archived successfully in the correct location.
- View the document properties in SharePoint and check these are as expected.
- (Finally, when you have completed your testing delete any test documents from the SharePoint archive.)

16.5 Further Capture Customizations

Overview

In this section a number of advanced functions are described that will help you to do further customisation of the document queue capture process. The functions available are:
- PreArchive
- PostArchive
- GetZetadocsArchiveID

PreArchive

The **PreArchive** function is similar to the **OverrideSendResult** function in the delivery parts of the Zetadocs SDK. This function gives a writable copy of the final information to be used in the archiving of the document from the queue. It is at this point that you get the opportunity to override the archive location and content type.

The **PreArchive** function has the following parameters:

Parameter	Type	Sub-type	Read/Write	Description
ZdArchiveContext	Record	Zetadocs Archive Context	Read	A read only runtime table to provide context information like the queue the item is in and the menu item that was clicked by the user.

Parameter	Type	Sub-type	Read/Write	Description
ZdArchiveSettings	Record	Zetadocs Archive Settings	Read/Write	A writable runtime table to allow you to modify properties of the archive action such as whether to archive and the archive location.

PostArchive

Zetadocs calls the **PostArchive** function to inform you of the archiving result and to allow you to implement workflow based on that information.

The **PostArchive** function has the following parameters:

Parameter	Type	Sub-type	Read/Write	Description
ZdArchiveContext	Record	Zetadocs Archive Context	Read	A read only runtime table to provides context information like the queue the item is in and the menu item that was clicked by the user.
ZdArchiveResult	Record	Zetadocs Archive Result	Read/Write	A writable runtime table to allow you to find out if the archive was successful and get the URL of the archived file.

Sample code:

The sample code below demonstrates how to use the standard SMTP email functionality in NAV to send an email with details about the archive operation that was just performed. The sample has been extended to use the Zetadocs archive search functionality to find all related documents and append links to them to the bottom of the email. To use this sample code, SMTP emailing must be set up in NAV.

```
   PROCEDURE PostArchive@1000000002(ZdArchiveContext@1000000000 : Record 9009992;VAR
ZdArchiveResult@1000000001 : Record 9009996);
   VAR
   ZdArchive@1000000002 : Automation "{B87DBB77-029B-40D7-93CE-912328221835} 1.2:{01C103A0-3852-4A8F-
83E6-E1B3A88B2273}:'Zetadocs Dynamics Utilities DLL'.ZdExtArchive";
   ZdArchiveDocs@1000000003 : Automation "{B87DBB77-029B-40D7-93CE-912328221835} 1.2:{DC2F0A50-A05A-
492E-97B5-C65F46EFB6C3}:'Zetadocs Dynamics Utilities DLL'.IZdArchiveDocs";
   documentToMatch@1000000004 : Automation "{B87DBB77-029B-40D7-93CE-912328221835} 1.2:{7A71C89D-746E-
4CD6-9621-5040659D05E5}:'Zetadocs Dynamics Utilities DLL'.ZdArchiveDoc";
   metadataFields@1000000005 : Automation "{B87DBB77-029B-40D7-93CE-912328221835} 1.2:{C598AA2C-E67F-
48EB-96F3-1A85F13C0E65}:'Zetadocs Dynamics Utilities DLL'.ZdMetadata";
   index@1000000006 : Integer;
   ZdArchiveDoc@1000000007 : Automation "{B87DBB77-029B-40D7-93CE-912328221835} 1.2:{04F44B47-DB79-4287-
B9FF-503D77179978}:'Zetadocs Dynamics Utilities DLL'.IZdArchiveDoc";
   metadataToMatch@1000000008 : Automation "{B87DBB77-029B-40D7-93CE-912328221835} 1.2:{C598AA2C-E67F-
48EB-96F3-1A85F13C0E65}:'Zetadocs Dynamics Utilities DLL'.ZdMetadata";
   ArchiveIDToMatch@1000000009 : Automation "{B87DBB77-029B-40D7-93CE-912328221835} 1.2:{96512292-17C0-
4D59-90A9-D2C547DA6EEB}:'Zetadocs Dynamics Utilities DLL'.ZdMetadataItem";
   Mail@1000000010 : Codeunit 400;
   EmailBody@1000000011 : Text[1024];
   RecRef@1000000012 : RecordRef;
   ShipmentNo@1000000013 : Code[10];
   OrderNo@1000000014 : Code[10];
   fRef@1000000015 : FieldRef;
   ArchiveID@1000000016 : Text[100];
   BEGIN
   ////////////////////////////////////////////////////////////////////////
   //
   // This sample code demonstrates how to use the Zetadocs search functionallity
   // to produce an email with information about the document that was archived
   // and links to any related documents.
```

```
//
// The sample code will only work correctly if the SMTP mail has been set up.
//
///////////////////////////////////////////////////////////////////////////

{
// Only do this if we attempted to archive and it succeeded
IF ZdArchiveResult."Archive Document" AND ZdArchiveResult."Archive Succeeded" THEN
BEGIN
  // First get some information about the record that we just linked to
  // and build up an email message to send
  RecRef.GET(ZdArchiveResult."Record ID");
  CASE RecRef.NUMBER OF
    110: // Sales Shipment Header
      BEGIN
        fRef := RecRef.FIELD(3);
        ShipmentNo := fRef.VALUE;
        fRef := RecRef.FIELD(44);
        OrderNo := fRef.VALUE;
        fRef := RecRef.FIELD(9009959);
        ArchiveID := fRef.VALUE;

        EmailBody := '<p>Successfully archived new document in sharepoint</p>' +
                STRSUBSTNO('<p>Sales Shipment: %1 for Sales Order: %2</p>', ShipmentNo, OrderNo) +
                STRSUBSTNO('<p>Click <a href="%1">here</a> to view the document</p>', ZdArchiveResult."Archive
Location");

        Mail.CreateMessage('Test User',
                'testuser@equisys.com',
                'testuser@equisys.com',
                'Sales Shipment Received',
                EmailBody,
                TRUE);
    END;
   ELSE
     BEGIN
       EXIT; // it's not a type of record that we recognise
     END;
END;

// Create the ZdArchive object
CREATE(ZdArchive,FALSE,TRUE);
ZdArchive.Initialize('sharepoint: ' + ZdUtilities.GetSharePointSite);

// Create an archive document to use with matching
CREATE(documentToMatch,FALSE,TRUE);

// Create an object to store the metadata fields to return
CREATE(metadataFields,FALSE,TRUE);

// Create a metadata field to store the archive id
CREATE(ArchiveIDToMatch, FALSE, TRUE);
ArchiveIDToMatch.Name := 'ZetadocsArchiveID';
ArchiveIDToMatch.Value := ZdUtilities.TrimGuidBrackets(ArchiveID);

// Create an object to store the metadata fields to match
CREATE(metadataToMatch, FALSE, TRUE);

// Add the archive id metadata field to the fields to match
metadataToMatch.Add(ArchiveIDToMatch);
```

```
// Add archive id to the list of fields to return
metadataFields.Add(ArchiveIDToMatch);

// Set the metadata fields to match in the document object
documentToMatch.Metadata(metadataToMatch);

// Set the current folder to the name of the document library to search
ZdArchive.CurrentFolder := 'Archive';

// Call GetDocuments to get the list of matching documents from sharepoint
ZdArchiveDocs := ZdArchive.GetDocuments(documentToMatch, metadataFields);

IF ZdArchiveDocs.Count > 0 THEN
BEGIN
  Mail.AppendBody('<p>--------- Related Documents ---------</p>');
END;

FOR index := 0 TO ZdArchiveDocs.Count - 1 DO
BEGIN
  ZdArchiveDoc := ZdArchiveDocs.Get(index);
  Mail.AppendBody(STRSUBSTNO('<p><a href="%1">%2</a></p>', ZdArchiveDoc.FileUrl, ZdArchiveDoc.Name));
END;

Mail.Send;

// Clear the objects we created
CLEAR(ZdArchiveDoc);
CLEAR(ZdArchiveDocs);
CLEAR(metadataFields);
CLEAR(metadataToMatch);
CLEAR(documentToMatch);
CLEAR(ZdArchive);
  END;
 }
END;
```

GetZetadocsRecordID

Zetadocs calls the **GetZetadocsArechiveID** function in the Zetadocs-Capture Integration codeunit to enable you to provide an alternative implementation for storing Zetadocs Archive ID's within NAV, perhaps in a different table. In the majority of cases you will not need to change this function.

The **GetZetadocsArchiveID** function has the following parameters:

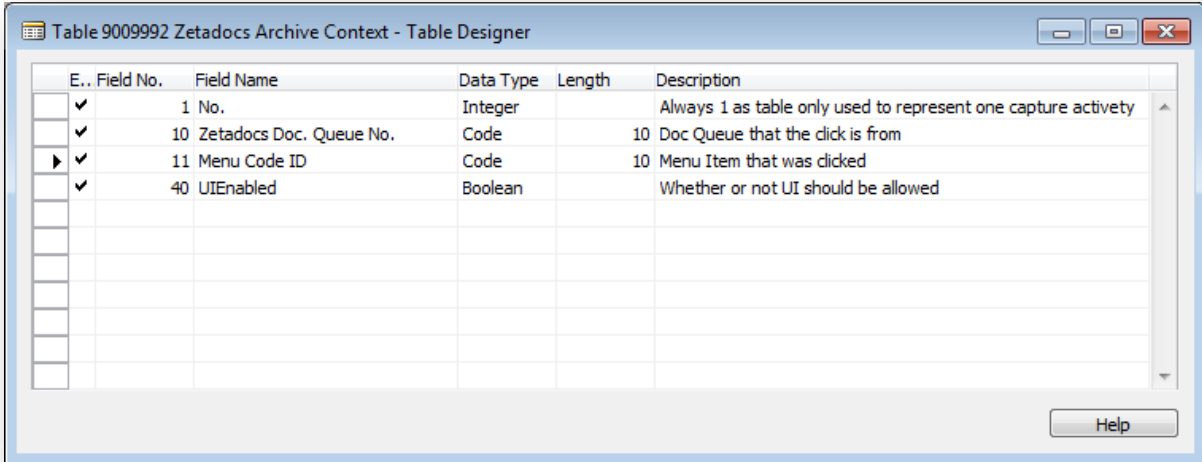| Parameter	Type	Sub-type	Read/Write	Description
Record	Record ID		Read	The Record ID
Return Value	GUID		Write	The GUID used to uniquely identify the record.

16.6 Capture Reference

Overview
This section gives details of the records used by the capture functions:
- Zetadocs Archive Context
- Zetadocs Archive Metadata
- Zetadocs Archive Result
- Zetadocs Archive Settings
- Zetadocs Doc. Q. Item Barcode
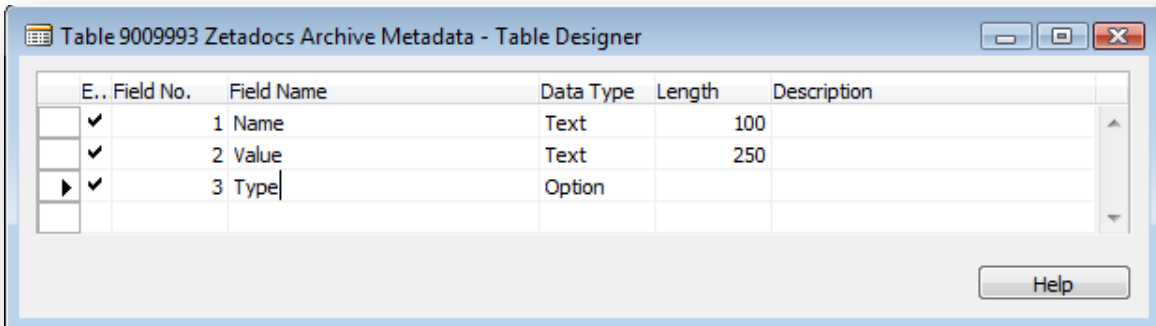
- Zetadocs Link Result

Zetadocs Archive Context

Figure 53 - Zetadocs Archive Context Table

The Zetadocs Archive Context table has the following fields:
- **No.:** Table record entry - please ignore
- **Zetadocs Doc. Queue No. :** Foreign Key to Zetadocs Document Queue table to allow you to know from which document queue the Link function has been called.
- **Menu Code ID:** Foreign Key to Zetadocs Document Queue Menu Item No. table to allow you to know which menu item had been selected by the user. Blank if used with GetAutoLink function.
- **UIEnabled:** Indicates whether UI (User Interface) dialogs should be shown or suppressed.
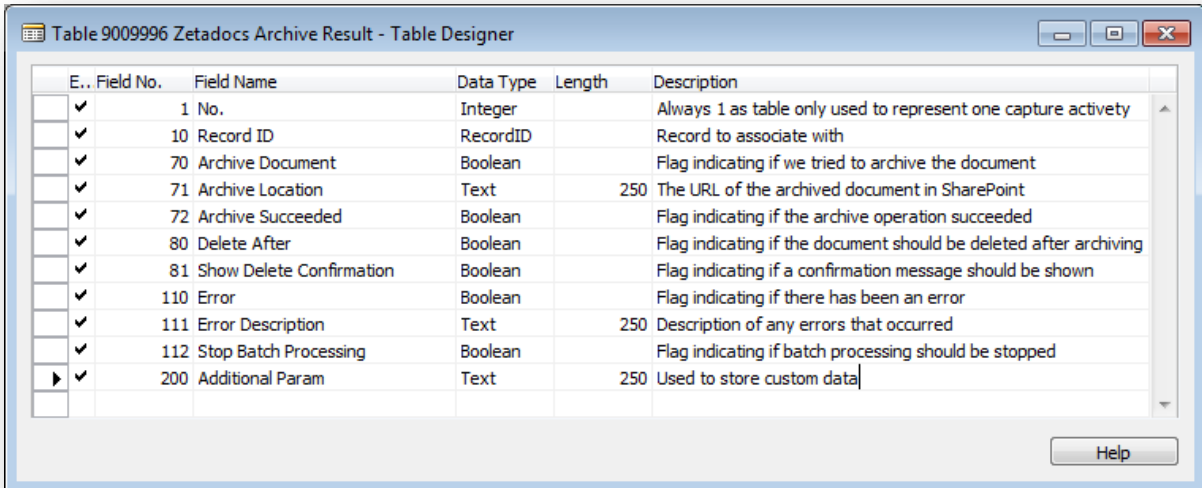
Zetadocs Archive Metadata

Figure 54 - Zetadocs Archive Metadata Table

The Zetadocs Archive Metadata table has the following fields:
- **Name:** Archive column name in SharePoint
- **Value:** The metadata value expressed as a string
- **Type:** The metadata type. Available types are NUMBER, DATE and STRING.
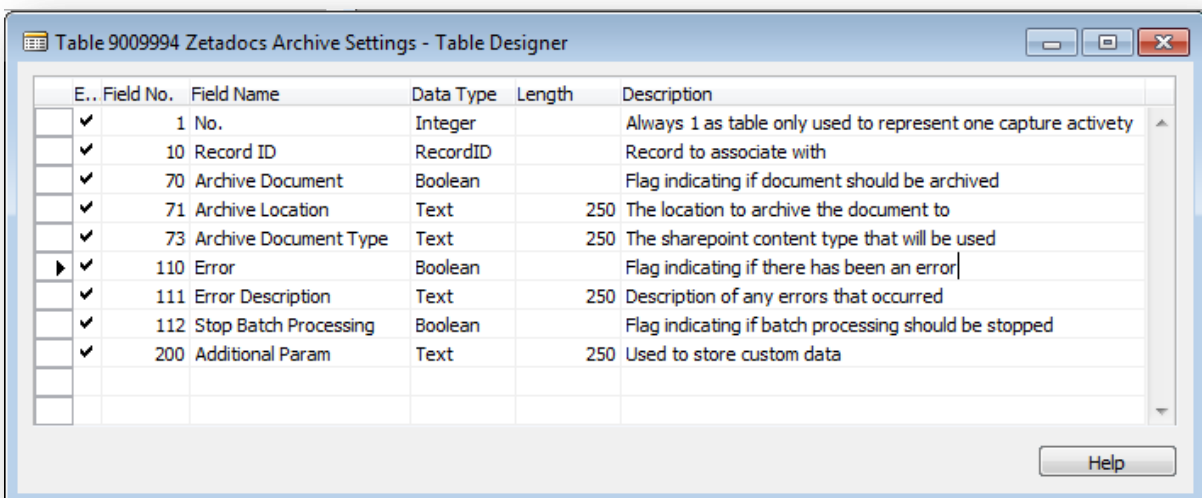
Zetadocs Archive Result

Figure 55 - Zetadocs Archive Result Table

The Zetadocs Archive Result table has the following fields:

- **No.:** Table record entry - please ignore
- **Record ID:** Un-typed record ID of the NAV record that the captured document is associated with.
- **Archive Document:** Indicates if the captured document is to be archived to SharePoint
- **Archive Location:** The URL of the archived document in SharePoint.
- **Archive Succeeded:** Indicates if the archive was successful.
- **Delete After:** Indicates if the document should be deleted
- **Show Delete Confirmation:** Indicates to Zetadocs whether prompt the user for confirmation of delete.
- **Error:** Indicates to Zetadocs whether an error occurred during the function.
- **Error Description:** A description of the error that occurred.
- **Stop Batch Processing:** Used only when auto linking where this Boolean indicates whether batch processing should stop or continue.
- **Additional Param:** Additional parameter to allow extra data to be passed between Zetadocs functions.
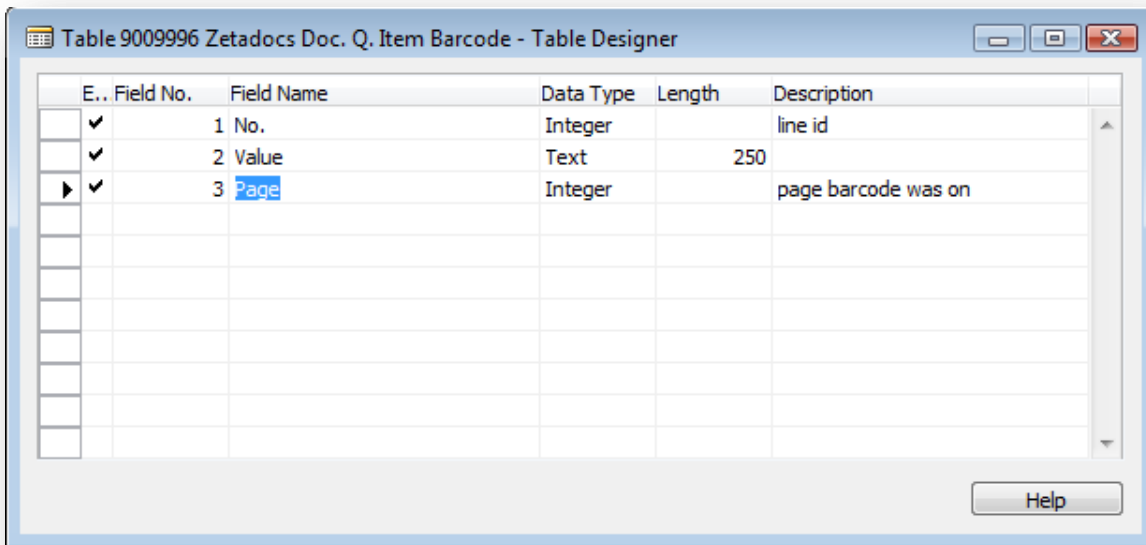
Zetadocs Archive Settings

Figure 56 - Zetadocs Archive Settings Table

The Zetadocs Archive Settings table has the following fields:

- **No.:** Table record entry - please ignore
- **Record ID:** Un-typed record ID of the NAV record that the captured document is associated with.
- **Archive Document:** Indicates if the captured document is to be archived to SharePoint
- **Archive Location:** The location to archive the document to in SharePoint.
- **Archive Document Type:** The SharePoint content type to be used when archiving.
- **Error:** Indicates to Zetadocs whether an error occurred during the function.
- **Error Description:** A description of the error that occurred.
- **Stop Batch Processing:** Used only when auto linking where this Boolean indicates whether batch processing should stop or continue.
- **Additional Param:** Additional parameter to allow extra data to be passed between Zetadocs functions.

Zetadocs Doc. Q. Item Barcode
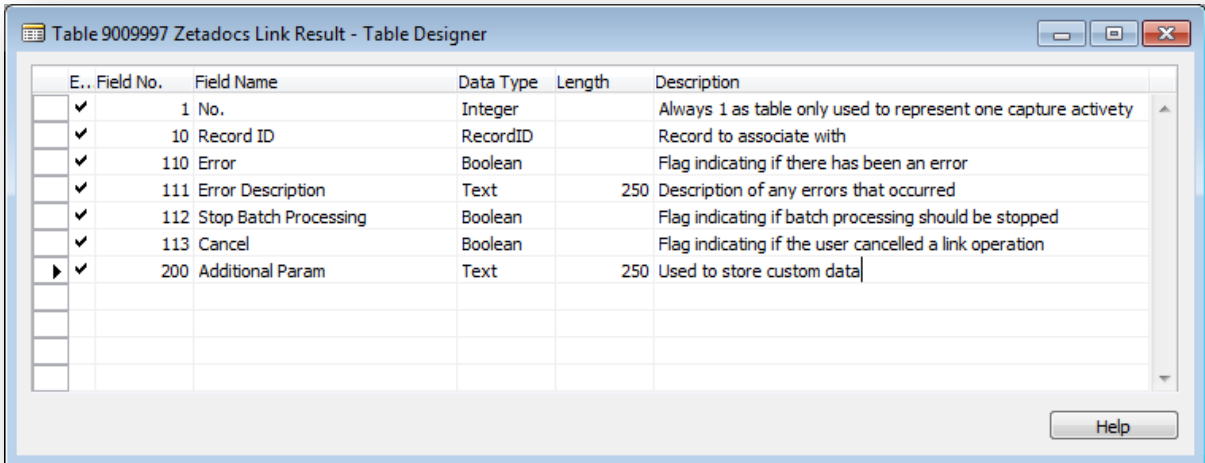
Figure 57 - Zetadocs Doc. Q. Item Barcode Table

The Zetadocs Doc. Q. Item Barcode table has the following fields:

- **No.:** Table record entry - please ignore
- **Value:** The barcode expressed as a string
- **Page:** The page number the barcode was on

Zetadocs Link Result

Figure 58 - Zetadocs Link Result Table

The Zetadocs Link Result table has the following fields:
- **No.:** Table record entry - please ignore
- **Record ID:** Un-typed record ID of the NAV record that the captured document is associated with.
- **Error:** Indicates to Zetadocs whether an error occurred during linking.
- **Error Description:** A description of the error that occurred.
- **Stop Batch Processing:** Used only when auto linking where this Boolean indicates whether batch processing should stop or continue.
- **Cancel:** Indicates whether the Archive action should be cancelled.
- **Additional Param:** Additional parameter to allow extra data to be passed between Zetadocs functions.

17. Automation using Extracted Text

Now that we have covered how you can use barcodes to automate some of your processes, we are going to demonstrate how text extraction on document capture can be used to add yet further automation. This section will deal with how to extract the text from a captured document and then an example of how this can be used to automate processes.

17.1 Enabling Zetadocs Document Capture Text Extraction

Zetadocs Capture Plus supports the parsing of document text, this can be used for identification numbers and metadata to facilitate document recognition. This then allows the automated linking and archiving of documents with NAV records. Implementing automated document recognition has many benefits including the streamlining of processes, by the automation of tedious repetitive activities and by automatically initiating internal workflows. To access this functionality you must enable text extraction on Zetadocs Document Queues configurations in the Zetadocs Server and then use a Zetadocs for NAV SDK function to get the path to the extracted text file.

Enabling text extraction in the Zetadocs Server

Each configured queue in the Zetadocs Server can have text extraction enabled independently. This allows you to enable text extraction processing on the queues in which you expect to implement document recognition. Furthermore it means that the unnecessary processing of documents is avoided. It is therefore recommended that you create separate queues for documents for which you intend to implement document recognition and for those you do not.

Configuring the Zetadocs Server

The image below shows a sample Zetadocs Server config.xml file. Note the element <EnablePDFTextExtractionToFile> on each queue <DocsQ>.

To enable text extraction set the value of the xml element to **true** to enable text extraction. NOTE: Due to xml serialization the value is case sensitive and must be set to **true** or **false**. True or TRUE or any other variation will be invalid.

```xml
<?xml version="1.0" encoding="utf-8" ?>
- <Config xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema">
  - <docsQueue>
    - <DocsQ Description="Sales Document Queue" Location="\\ServerName\Sales Document Queue\">
        <EnablePDFTextExtractionToFile>false</EnablePDFTextExtractionToFile>
      </DocsQ>
    - <DocsQ Description="Purchase Document Queue" Location="\\ServerName\Purchase Document Queue\">
        <EnablePDFTextExtractionToFile>false</EnablePDFTextExtractionToFile>
      </DocsQ>
    </docsQueue>
    <PDFQuality>Better</PDFQuality>
    <EnableAbbyy>true</EnableAbbyy>
    <StellentTimeOut>10</StellentTimeOut>
    <StellentBypassPDF>true</StellentBypassPDF>
    <LogLevel>Error</LogLevel>
    <LogToFile>true</LogToFile>
    <LogToEventLog>false</LogToEventLog>
    <EnableBarcodeDetection>false</EnableBarcodeDetection>
  </Config>
```

Accessing the extracted text file from NAV

Once you have enabled the text extraction in the Zetadocs Server you will need to implement parsing of the text file in NAV. This is done using the Zetadocs Capture Customize codeunit.

In the Zetadocs- Capture Customize codeunit trigger GetAutoLink() the path to the control file for queue items is available as the ZdControlFile :Text[250] parameter. Using this you can call a Zetadocs Utilities function to return the associated extracted text file path for that item.

```
textFilePath := ZdUtilities.GetExtractedTextFilePath(ZdControlFile);
```

You can now implement your own functionality to parse the text file for expected text metadata which will help you to identify the document and its associated record in much the same manner as is described for the barcode recognition feature of Zetadocs for NAV. For more information, please see section 16.

17.2 Approvals in NAV using Extracted Text

Now that we have successfully identified and extracted the information we require we can put it to work in NAV, in this example we will be setting NAV so that it starts an approval process.

In this example we will be looking at the following business process:

> Raise and send out a purchase order from NAV using Zetadocs
> Received by the vendor who will raise a sales order and send the goods.
> They will attach a shipment note to the delivery and also send a purchase order.
> These documents will be Captured into the relevant Zetadocs Document Queue either via scanning of hardcopies or processing of other documents by the Zetadocs Server.
> When the Purchase Invoice is Captured, Zetadocs extracts the text including the original purchase order number.
> When the Purchase Invoice is processed and added to the Zetadocs Archive this set in motion the approval process in NAV.

The existing Document Queues as setup by default do not support the initialization of the approval process. As such we need to adjust the Zetadocs-Capture Customize codeunit so that it begins the approval process when an invoice is archived.

Creating the IsValueInFile function

- Select the Zetadocs-Capture Customize codeunit in the object designer, and select Design.
- Select View→C/AL Globals and choose the functions tab.
- Add the function **IsValueInFile**, details below.
-

Name	**IsValueInFile (Value, FilePath)**	
Description	Searches if a given **Value** is present in the file pointed by **FilePath**	
Arguments	**Value** text[30]	The value to search for
	FilePath text[1024]	The associated text file to look in
Returned value	**True** if the number is present	
	False if not	

Adding Code into the IsValueInFile function

Now that we have added the function into the codeunit we need to add the following code, open the C/AL editor (F9) and paste in the code below into the IsValueInFile section. We recommend that you review this now to gain an understanding of how it operates, comments have been included throughout to explain the various sections.

CODE:
```
IsValueInFile(text[30] Value; text[1024] FilePath)
{
// Set file to be opened in text mode and for reading only
file.TEXTMODE(TRUE);
file.WRITEMODE(FALSE);

// If we can't open the file, just return false as we cannot match a value
IF NOT file.OPEN(FilePath) THEN
BEGIN
  EXIT(FALSE);
END;

// Cycle through all lines in the file until we find te value we were
// looking for or
// we reach the end of the file
REPEAT
  // Read each line at a time
  IF file.READ(line) <> 0 THEN
  BEGIN
    // Check if value appears anywhere in the line
```

```
// NOTE: If values wrap over more than one line they will not be matched
pos := STRPOS(line, Value);
IF (pos <> 0) THEN
BEGIN
  // We've found the value we were looking for, close the file and
      // return true
  file.CLOSE;
  EXIT(TRUE);
 END;
END;
UNTIL file.POS = file.LEN; // Check if we have reached the end of the file

// We've reached the end of the file without finding the value we were
//looking for
// Close the file and return false
file.CLOSE;
EXIT(FALSE);
}
```

Creating the GetMatchingPurchaseOrder function

- Next return to the functions tab, View→C/AL Globals.
- Add the function **GetMatchingPurchaseOrder**, details below.

Name	**GetMatchingPurchaseOrder (Orders, ZdControlFile)**	
Description	Searches through the ZdControlFile to find a matching Purchase Order	
Arguments	**Orders** record List of opened purchase orders	
	ZdControlFile text[1024] The control file of the document queue item	
Returned value	**True** if the Order matches the DQF file	
	False if not	

Adding Code into the GetMatchingPurchaseOrder function

Now that we have added the function into the codeunit we need to add the following code, open the C/AL editor (F9) and paste in the code below into the GetMatchingPurchaseOrder section. We have included comments throughout to explain the various sections.

CODE:
```
GetMatchingPurchaseOrder (Record Orders, Text[1024] ZdControlFile)
{
 // Clear any filters on the Orders record
 Orders.RESET;

 // Set range so we are only looking at orders
 Orders.SETRANGE(Orders."Document Type",Orders."Document Type"::Order);

// Make sure there are records to search through
 IF Orders.FIND('-') THEN
 BEGIN
        //Loop through records until we find a matching one or reach the end
 REPEAT
        // Check if the order number can be found in the file
        // NOTE: For this example we have changed the orders number
        //series so order numbers will look like:
        // "PO-00001" This should be unique in the file so we don't get
        //false matches
        IF IsValueInFile( Orders."No.",
                ZdUtilities.GetExtractedTextFilePath(
                                        ZdControlFile)) THEN
        BEGIN
        // We've found the right purchase order so return true
```

```
        EXIT(TRUE);
        END;
UNTIL Orders.NEXT = 0;
 END;


 // Reached the end of the orders without matching one, so return false
 EXIT(FALSE);
}
```

Adjusting the GetAutoLink Function

Now we have created and added code to our variables we need to adjust the **GetAutoLink** function. This is so it can look through all the Orders and find out if one of them matches up the Purchase Order number that is present in the associated file being archived. Scroll to the GetAutoLink section and add the code so that it surrounds the existing code as shown below.

CODE:

```
GetAutoLink  (…)
{
 ZdUtilities.Log(0, 'C9009964 - AutoLink');

 CASE ZdArchiveContext."Zetadocs Doc. Queue No." OF
        'ZDQ0020','ZDQ0021':
        // Purchase Invoice and Purchase Receipt Document Queues
        BEGIN
    // Use the information in the control file to find a matching purchase order
    IF GetMatchingPurchaseOrder(Orders, ZdControlFile) THEN
    BEGIN
     // use a RecordRef to get the record id for the matching record
     RecRef.GETTABLE(Orders);
     ZdLinkResult."Record ID" := RecRef.RECORDID;
     ZdLinkResult.MODIFY;
    END;
  END
 ELSE
  BEGIN
                ...
                ⊱┄┄⊰┄┄ EXISTING CODE HERE ┄┄⊱┄┄⊰
                ...
  END
 EXIT;
}
```

Adjusting the PostArchive Function

Next we need to add some extra code into the **PostArchive** function to send the Purchase Approval for a given item. Again this code needs to be pasted around the existing code.

PostArchive (…)
```
{
 // Check if the archive was successful
 IF NOT (ZdArchiveResult."Archive Document" AND
        ZdArchiveResult."Archive Succeeded") THEN
 BEGIN
  EXIT;
 END;

 // Check this is the purchase invoice document queue
 IF ZdArchiveContext."Zetadocs Doc. Queue No." = 'ZDQ0020' THEN
```

```
BEGIN
        // Use a RecordRef to get values from the record
        IF NOT RecRef.GET(ZdArchiveResult."Record ID") THEN
        BEGIN
                // Could not get the record from the record id
                EXIT;
        END;

        // Get a fieldref to the document type field
        fRef := RecRef.FIELD(1);

        // Store the value as an integer so that we can compare it
        DocType := fRef.VALUE;

        // Check we have linked to an order
        IF (DocType <> PurchaseOrder."Document Type"::Order) THEN
        BEGIN
                // If it is not an order we cannot start approval, so exit
                EXIT;
        END;

        // Get a fieldref to the No. field
        fRef := RecRef.FIELD(3);

        // Store the order no
        OrderNo := fRef.VALUE;

        // Set range of the purchase order record so only looking at
        // orders
        PurchaseOrder.SETRANGE( "Document Type",
                                PurchaseOrder."Document Type"::Order);

        // Set range so only looking at this specific order
        PurchaseOrder.SETRANGE("No.",OrderNo);

        // Check that an order exists in the range
 IF PurchaseOrder.FIND('-') THEN
 BEGIN
   // Call into approvals management codeunit to start the approval process
   IF ApprovalsMgmt.SendPurchaseApprovalRequest(PurchaseOrder) THEN;
 END;
END;

{
 …
 ⫶⋯⫶⋯ EXISTING CODE HERE ⋯⫶⋯⫶
 …

}
```

This should complete the setup required for the Purchase Invoices to generate an approval process, obviously the above example can be modified using different queue id's to effect different queues and thus document types.

18.Testing Zetadocs Capture Plus

This section will detail the steps required to ensure that the Capture Plus elements of your system are operating as expected. It will not cover those aspects already tested earlier but may overlap on some areas already tested. You may wish to test on a mixture of the NAV classic and Role Tailored Clients as required by the systems specifications to ensure all functionality operates as expected.

18.1 Document Queues

This section details how to test that the Document Queue is functioning correctly. The terminology "Zetadocs Document Queue" in this section is used to describe all document queues.

Check Scanning (Optional)

If a scanning device is connected, perform the following checks to ensure correct operation.
- Click the **Queue → Scan**... button to initiate scanning which uses the Zetadocs client settings.
- Scan a document; once scan is complete the user should be prompted to name the document.
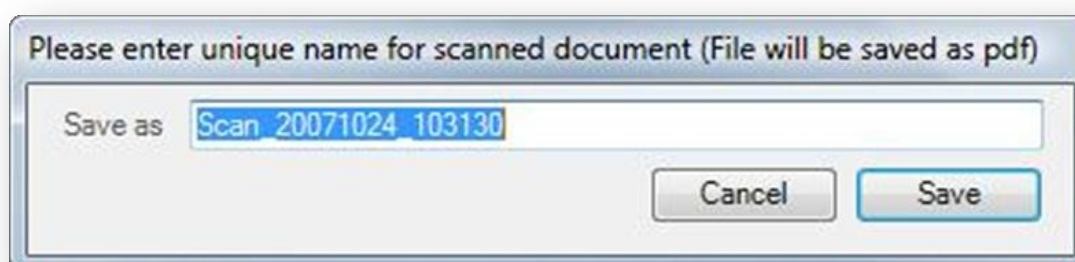
Figure 59 – Enter Scanned Document Name

- Upon Save, the scanned document name should appear in the Zetadocs Document Queue as the latest entry. The file (typically *"filename.pdf"*) should also be in the Zetadocs Document Queue shared folder location.

Check Shared Location Updating

- Create an email with an attachment and save it as a *.msg* file into the Zetadocs Document Queue's shared folder location.
- Select the **Queue→Refresh** menu button and ensure that the saved email.msg file is now in the Document Queue converted into pdf format.
- Select the entry in the Zetadocs Document Queue and click **Item→View**, ensure that the item is viewable in pdf format
- Select the entry in the Zetadocs Document Queue and click **Item→View Original**, ensure that the item is viewable in its original format.

Check Printing

- Select the scanned *.pdf* file and click **Item→Print**, when prompted select a physical printer and click print. Ensure that the document prints to the printer.
- Select the recently added *email* with attachment(s) now stored as a pdf file and click **Item→Print**, when prompted select a physical printer and click **Print**. Ensure that the document prints to the printer and that the attachments are printed out also.

Check Delete

- Select an entry in the Zetadocs Document Queue and click **Item→Delete**. Ensure that the document is removed from the Queue and also that it successfully deletes the file from the Zetadocs Document Queue network folder location.

18.2 Creating Documents using the Sales and Purchase Document Queues

The Sales and Purchase Document Queues have the capacity to generate a number of different documents within NAV. These are predetermined and you should do a test for each that you intend to implement in the system.

Sales and Purchase Queue Create Options:
    Quote
    Order
    Invoice
    Blanket Order
    Credit Memo
    Return Order
    Link to existing sales document (posted or unposted)

Creating a Document using the Sales and Purchase Document Queues

- Open NAV and open the Zetadocs Sales Document Queue.
- Ensure the queue is populated with a selection of sample or test documents.
- Select one of the items from the queue and select **Create** and then the type of document you wish to test. In this case we'll look at a **Quote**, normally a user would view a queue item using the Zetadocs Viewer and use this as the basis for filling in the quote, order invoice etc details.
- This will display the **Sales Quote** window. Fill in the form as usual and when finished click the **Print** button.
- This displays the Sales - Quote dialog box. To send your documents using Zetadocs, check that **Send using Zetadocs** is selected on the **Options** tab.
- Click Print again. This displays the Sales – Quote - Print dialog box. Click OK. This displays the **Zetadocs Delivery window**, where you can change any settings if you want to, e.g., if you want to address your quote to a different contact, or if you want to change the template.
- On the **Zetadocs Delivery window,** if you select **Preview in Zetadocs Client before sending,** this allows you to preview your document in the Zetadocs Client before actually sending it. But if you do not select this option, your document is sent directly to the recipient.
- After sending the order, the **Send Result** dialog box is displayed, showing you the result. If you click the **Show log** button, you can see information about the Quote you sent, and it will also tell you the location where the Quote has been archived as per your archiving options in Microsoft SharePoint.
- You can now close the Sales Quote window. The Zetadocs Status Message is displayed advising you that a copy of your document that you have just processed from the Zetadocs Document Queue, has been saved in the archive and will also give you the archive location in Microsoft SharePoint. You will be asked whether you want to delete the document from the document queue. If you no longer require the document to be in the Document Queue, you can delete it. You can always go back to the Microsoft SharePoint location where the document was saved to view it.
- Repeat this process for the other Sales items and the Purchase queue as required.
- Open your SharePoint Archive and ensure the documents have been archived as expected.

18.3 Creating Documents using the Custom Document Queues

The Custom Document Queues have the capacity to generate a number of different documents within NAV based solely upon the requirements of the system. As these can take a number of forms you should do a test for each that you intend to implement in the system in the manner it is likely to be used. The example below will look at testing a Shipment Document Queue.

Creating a Document using Custom Document Queues

- Open NAV and open the Zetadocs Shipping Document Queue.
- Ensure the queue is populated with a selection of sample or test documents.
- Select one of the items from the queue and select **Archive.**
- The available Actions should be listed. Ensure your Actions are all displayed.
- Select each in turn and create and send a document.
- Repeat this process for the other queues as required.
- Open the SharePoint Archive and ensure the documents have been archived and sent as expected.

Zetadocs for NAV Delivery Plus Setup and Configuration

Note: The following sections of the installation guide cover the installation and setup of the features provided as part of the Zetadocs for NAV Delivery Plus module. Users who wish to install and utilise these features will need to purchase the required licence from Equisys.

19. Zetadocs Delivery Plus - Architecture Overview

The Zetadocs for NAV Addin can be split into 2 main areas, data and processing. The installation guide dealt primarily with setting up the data that would determine our report formatting and send information when sent to the Zetadocs Client. We saw how reports could be grouped into Document Sets which share a common rule for formatting and archiving and we saw how rules can be stored which alter formatting and send information dependant on who we were sending to. It is assumed then that we have a good understanding of the information involved in sending a report using Zetadocs for NAV. In this architectural overview the process of collating the sending information, which we refer to as the "Send Results", is explained. This includes a breakdown of the main processing areas and their use in integrating with NAV as well as an insight into the customization potential and extensibility of Zetadocs for NAV.

19.1 Typeless Public and Private Code

The Zetadocs for NAV processing code is split into two categories, public and private. Public being NAV objects that we have installed which are editable by a VAR, and private, the objects that are not editable. This is more commonly known in NAV as having "Modify" rights on the codeunit or not. The code is also written so that it is typeless, meaning it is not compiled against specific tables in NAV, all data access is done using table and field references and therefore the code is adaptable to work with any data set. This concept will become clearer as we progress through the examples in this document. The core processing codeunits of Zetadocs for NAV are private as this allows us to be able to provide upgradable object versions of our core processing engine without additional work necessary from a VAR to copy and reconfigure customization they have made. To ensure that we still remain a highly customizable solution we ensure that all our processing data is typeless and all interactions with existing NAV data and objects remain public, and are therefore editable by a VAR.

19.2 Data Processing Flow

Now let's look at the flow of data that occurs when sending a report. The following diagram helps to visualize the process and will aid us in discussing the relevant parts of the product.

As you can see from the diagram it starts with a NAV report that has been modified for Zetadocs for NAV. A report is generally based on a set of records that are used to produce some report output, a document for each record. The records contain information that relates to a contact and possibly a company, to whom the report should be sent (i.e. the recipient). Sometimes that information can be a direct table reference to an existing table that represents a contact or company for example, or it may contain some other form of references which can be used to find the contact information from another source. This could be a look up table of some sort based on some bespoke logic. The Zetadocs Send Results Gen codeunit is the central processing controller and builds a runtime list of send results in a temporary table of type "Zetadocs Send Result" for each record in the report.
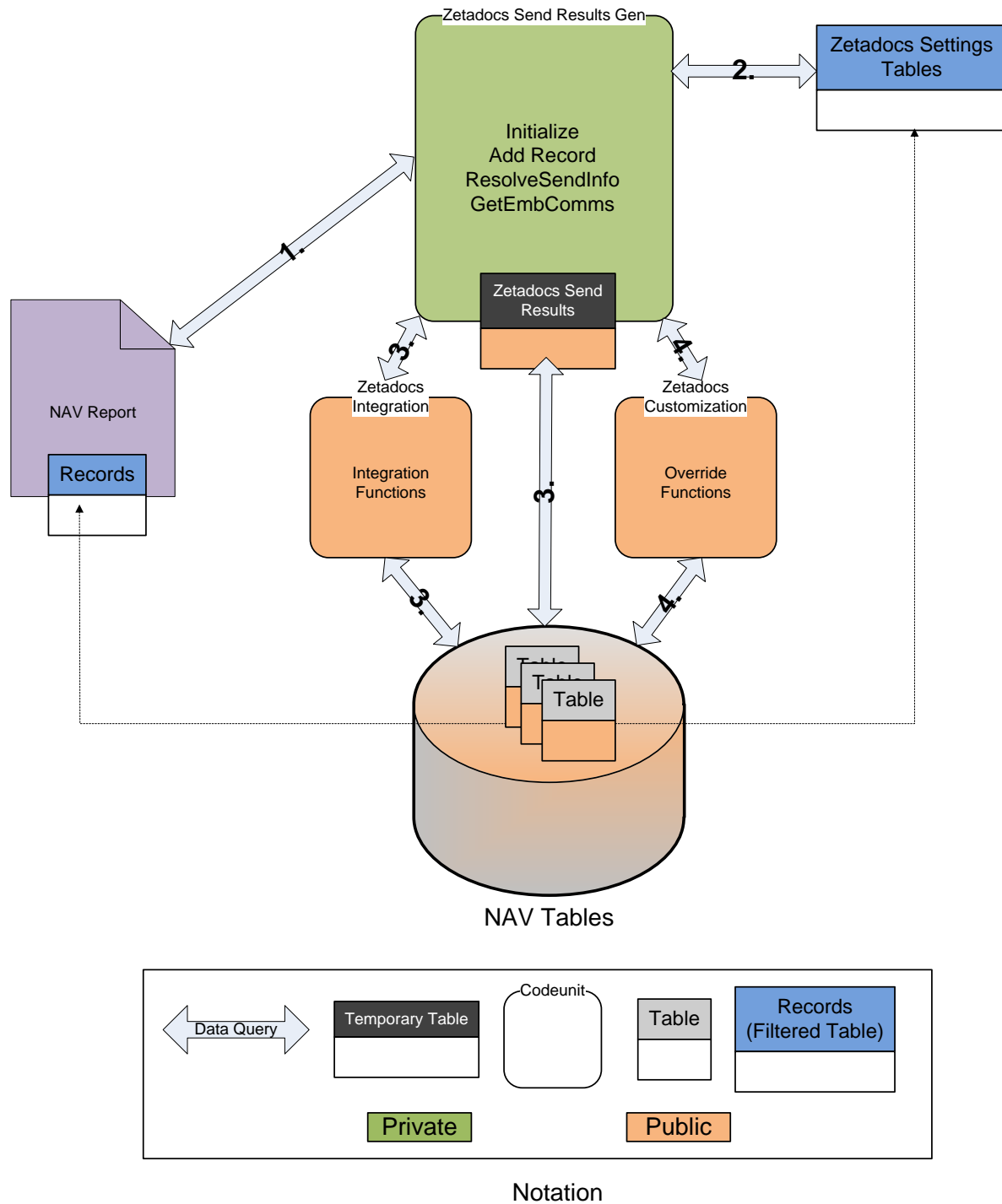
Figure 60 - Zetadocs for NAV Architecture Diagram

Interfacing with the Zetadocs Send Results Gen codeunit (1.)

A report modified for Zetadocs for NAV will call the four trigger functions on the Zetadocs Send Results Gen codeunit. Firstly, **Initialize (1.)** is called to set the report that is being printed. The initialization information allows us to determine what report settings, if any, have been specified **(2.)**. After initialization we start to process individual record specifics. Each record reference is passed to the send results codeunit by calling **AddRecord (1.)**. Each record is then processed to extract the contact information **(3.)**. Depending on who the company is we may apply specific rules covering how the contact or the template is determined. When all rules and settings have been applied the "Zetadocs Customize" codeunit is called to offer overriding of the result **(4.)** (This requires the Zetadocs for NAV SDK Granule). Once all the records have been added **ResolveSendInfo (1.)** is called which will offer run-time user override and error resolution dialogs. The final

step is for the report to request the formatted embedded commands text to print for each report by calling **GetEmbComms (1.)**. Once again a call is made to offer the ability to add additional embedded commands in the Zetadocs-Send Customize codeunit **(4.)** before returning the full text of embedded commands to the report. These embedded commands are then extracted by the Zetadocs Client after printing to the Zetadocs printer.

Querying the Zetadocs Settings (2.)

Based on the ID of the report that is being printed we can determine what template and archiving settings to use for the report and potentially how to automatically find the company and contact references from the report records. Internally the Zetadocs Send Results Gen codeunit will query the Zetadocs Report Settings using the report ID. These settings control the flow of processing from this point on.
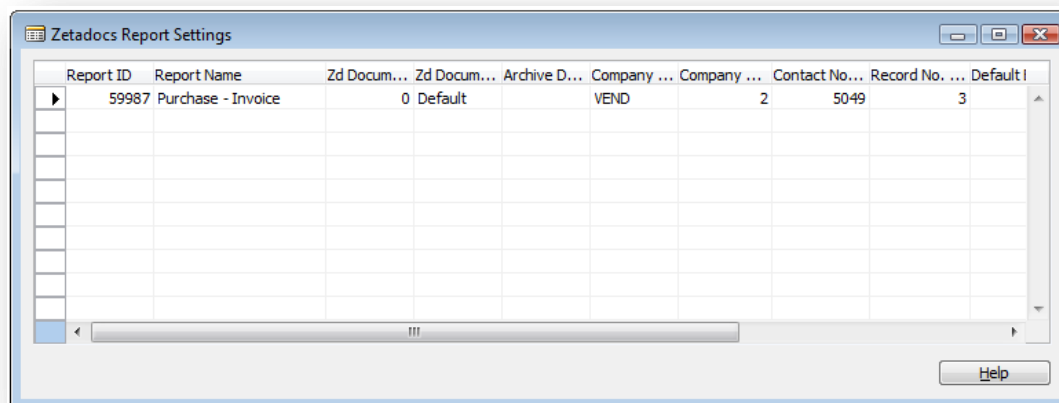
Figure 61 - Zetadocs Report Settings

Resolving the Company and Contact Information (3.)

This can happen in a number of ways depending on the Zetadocs Report Settings for that report. The report settings control whether the Zetadocs Send Results Gen codeunit can copy the company and contact references from a field in the record or whether it should call out to the "Zetadocs-Send Integration" codeunit for the information. It is in this public codeunit that a VAR will implement their custom integration code for their system. This is explained in more detail in a later section of this guide; however, this should highlight the main purpose of the Zetadocs-Send Integration codeunit and the Zetadocs Send Result table being public. It means that when we need to access data from typed NAV tables this code is exposed to the VAR developer to allow them to integrate or customize successfully. The private Zetadocs Send Results Gen codeunit only correlates and manages the data, unaware of its meaning (typelessly).

Overriding in Customize Codeunit (4.)

There is the ability to alter the Zetadocs Send Results record directly in this codeunit before continuing with sending of a report. Each send result is passed to this codeunit by calling **OverrideSendResult** internally in the Zetadocs Send Results Gen codeunit. This gives the VAR a great opportunity to implement customized business logic above that offered by Zetadocs for NAV. An example would be altering the recipient (contact) depending on the value of an order. The second potential customization is to add additional embedded commands for tailoring email messages using dynamic fields in Zetadocs Templates or adding extra metadata to be archived with the document.

19.3 Summary

Now that we have been introduced to the architectural overview of Zetadocs for NAV it should be easier for us to understand the sections which follow and begin to allow us to imagine the potential customizations and workflow that could be created with the Zetadocs for NAV Addin.

20. Send Any Report

In the installation guide we saw how to configure Zetadocs for NAV to send reports from the Sales Order and Purchasing processes. We edited the NAV reports for Zetadocs for NAV and set the report settings to point at the Customer or Vendor reference for that report and the respective Contact reference. With this information Zetadocs for NAV was able to extract the references and query the names, email addresses and fax addresses of the contact, as well as, cross reference the company (Customer or Vendor) reference with the associated Zetadocs Customer or Vendor rules tables to apply per company formatting and addressing logic. This however is not the limit of Zetadocs for NAV functionality. This principle of field reference and related information resolution can be applied to almost any report. In this section we will see how small changes in the report settings can control and alter the information used to address, format, send and archive a report using Zetadocs for NAV.

20.1 Permissions

Before we enable more reports for sending there are some permission considerations to consider. The Zetadocs-Send Integration codeunit has a function that is called by the Zetadocs Send Results Gen codeunit to set the Zetadocs Archive ID for any record being archived. This is here to allow a VAR to add to the permissions of this public codeunit any tables they wish to send and archive using Zetadocs for NAV. For this reason please follow these instructions for each report you wish to enable for archiving.

- Determine the table type (<TableName>) of the record you are sending in the **AddRecord** command in your report. (This is the record which will have the Zetadocs Archive ID set in it.)
- Modify the table is the table designer. Add the "Zetadocs Archive ID" field (case sensitive, type GUID)
- Ensure that the field no. you choose for this field is the same as other tables in the posting line to ensure correct copying of the archive id across the tables during posting.
- Modify the permissions on the Zetadocs-Send Integration codeunit (9009963) to include **"TableData <TableName> =rm"**

20.2 Simply Send

Perhaps you have no requirement for the power of the rules support provided by Zetadocs for NAV for a particular report or number of reports. You simply want to give your users the ability to manually address a report at runtime using contact information in NAV and send using Zetadocs. For example you need to send the Warehouse Shipping Status report to someone who does not have access to that report in NAV. This is simply done by not associating the Zetadocs edited version of the report with any Zetadocs Document Set in the Zetadocs Report Settings. The following instructions explain how to set this up.

- Edit the desired report for Zetadocs for NAV (See the "Single Recipient" report style in section o.)
- Do not enter any report settings in the Zetadocs Report Settings for your modified report.
- Set the printer selection for your modified report to Zetadocs (Administration\General\Printer Selections in NAV).

Now when the report is run you should see the Zetadocs Delivery Dialog where you can select your addressing and template information.
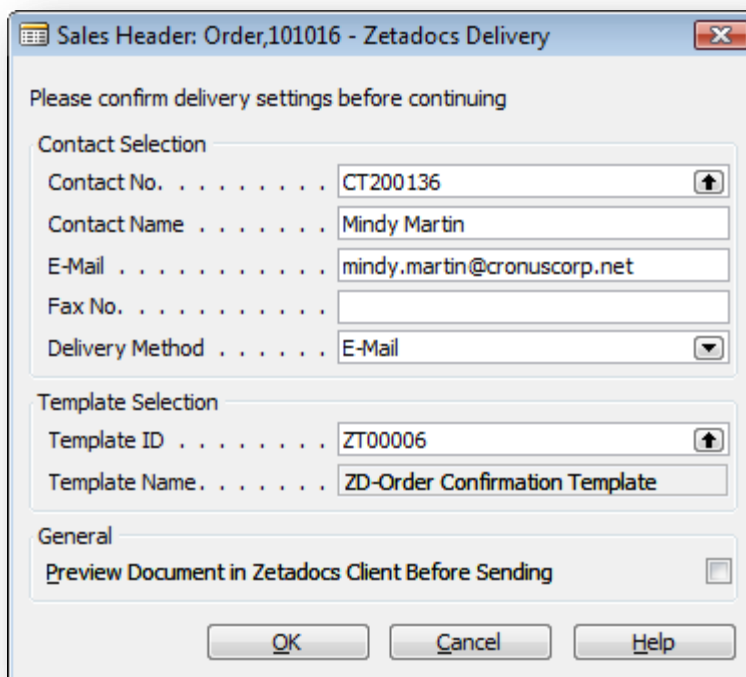
Figure 62 - Zetadocs Delivery Dialog

20.3 Configured Send

It should be clear by now from the installation guide that by setting the "Company Type Code", "Company No. Field No." and "Contact No. Field No." fields in the Zetadocs Report Settings that you can configure Zetadocs for NAV to automatically resolve your contact information and apply company specific rules if they exist. In this way it is possible to reference any fields which contain the right type of reference (i.e. customer/vendor or contact etc). There is some logic to the application of these settings that is important to know to help decide what settings to enter but it also gives the opportunity for some variations in configuration.

Zetadocs Report Settings Field No.'s Reference Logic (Pseudo Code)

```
IF Company Type Code <> NULL THEN
  IF Company No. Field No. <> NULL THEN
    Get the Company No. from Record using Field No.
  ELSE
    CALL Integration codeunit GetCompanyForReport for VAR to get Company No.
  END
END

Send Result.VALIDATE(Company No., Company No. Value)

IF Contact No. Field No. <> NULL THEN
    Get the Contact No. from Record using Field No.
  ELSE
    CALL Integration codeunit GetContactForReport for VAR to get Contact No.
  END

Send Result.VALIDATE(Contact No., Contact No. Value)
```

From this it is important to notice the order that validation happens in as this coordinates with the Zetadocs Send Result table **OnValidate** trigger code for "Company No." and "Contact No.". Since the company information is validated first no contact reference will be set yet. We can check for this and default to using the company's communication information, later when the contact reference is validated we can override

the addressing information (email, fax). This provides the fallback addressing logic of Zetadocs for NAV so that if a record has a blank reference for a contact we will still end up with the company correspondence information. This means that we can deliberately control what information is used by altering the settings. It also means that this behavior can be customized by the VAR by implementing the get trigger functions in the Zetadocs-Send Integration codeunit and/or changing the OnValidate triggers in the Zetadocs Send Result table.

Company Type Code	Company No. Field No.	Contact No. Field No.	Resulting Addressing Info Used
SET	SET	SET	Contact Info unless the reference in record is blank THEN Company Info
SET	NULL	SET	Contact Info unless the reference in record is blank THEN Company Info using Company Reference implemented by VAR
SET	NULL	NULL	Contact Info using Contact Reference Implemented by VAR unless that reference is blank THEN Company Info using Company Reference implemented by VAR
NULL	NULL	SET	Contact Info
NULL	SET	SET/NULL	Invalid – You must specify a company type to enable use of company field.

Table - Zetadocs Report Settings Addressing Information Control Options

To get a strong understanding of this it is recommended that you review the OnValidate triggers for "Company No." and "Contact No." in the Zetadocs Send Result table and familiarize yourself with the trigger functions in the Zetadocs-Send Integration codeunit. These are explained in detail in the next section.

20.4 Custom Send

We saw in the last section how selecting certain report settings can control the flow of the operation of the Zetadocs processing codeunits. By exploiting these settings and implementing the trigger functions in the Zetadocs-Send Integration codeunit we can highly customize our report sending. In this section we will focus on the trigger functions in the Zetadocs-Send Integration codeunit and explain how they can be used.
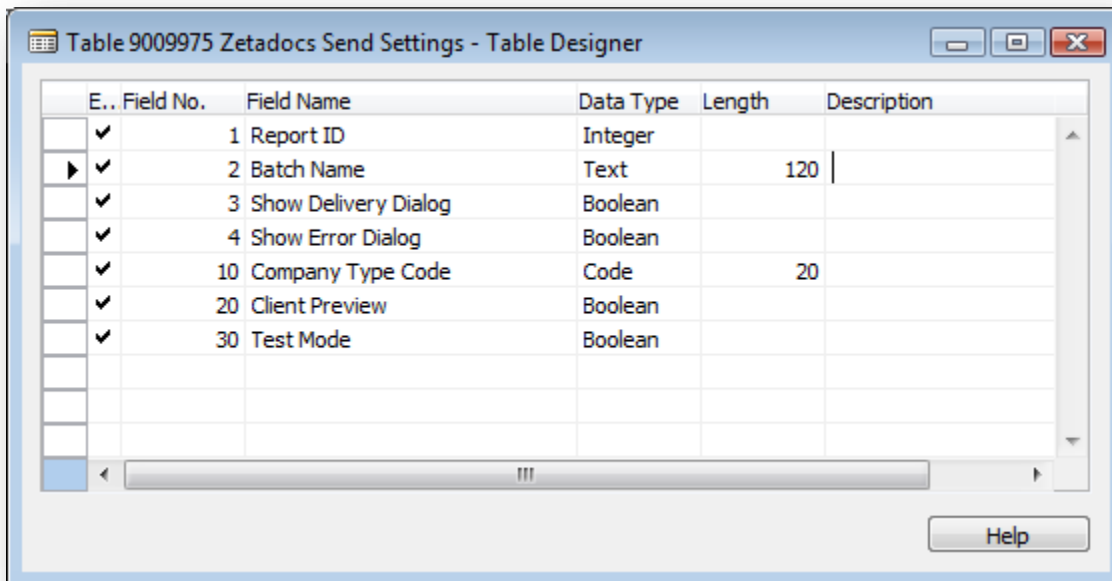
GetZetadocsArchiveID
WARNING: This function should be left unchanged. It is only exposed in this codeunit to allow a VAR to add additional permissions to the codeunit for reading and writing the Zetadocs Archive ID value to and from additional tables!

OverrideSendSettings
Apart from setting up the company and contact field number references in the Zetadocs Report Settings there are a number of other options that control the display options and the report batch information settings. During the **Initialize** function (See Architecture Overview) these settings are copied in to a temporary table called the Zetadocs Send Settings. This gives us the ability to adjust these settings at runtime. Once the report settings have been copied into the temporary send settings table described, the Zetadocs Send Results Gen codeunit calls the **OverrideSendSettings** trigger function in the Zetadocs-Send

Integration codeunit. Here you can modify the settings based on some logic for that send instance. Let's have a look at the Zetadocs Send Settings table.

Figure 63 - Zetadocs Send Settings

- **Report ID:** WARNING: This is not for editing. It is here to allow the developer to determine which report is being printed in the trigger and to branch CASE or IF statements depending on its value.
- **Batch Name:** In the Zetadocs Report Settings you have the ability to specify a "Default Batch Name". This is the name that will be displayed in the Zetadocs Client for the report records printed to Zetadocs. This default value can be overridden in this function.
- Show Delivery Dialog, Show batch Delivery Dialogs, Preview in Zetadocs Client and Test Mode: All these can be dynamically overridden in this trigger at runtime.
- **Company Type Code:** Similar to the Report ID, this value is not for editing but is present to allow the developer to determine the target company type configured for this report without having to query the Zetadocs Report Settings Table.

A good example of when you might use this function is if you wish to have a report run uninterrupted by UI dialogs and previewing in the Zetadocs Client if it is being sent during the night. All previews could be turned off.

GetContactForReport

As explained in the previous section, not specifying a "Contact No. Field No." means that this function will be called for you to return the value. This means that you are not restricted to extracting the reference directly from the record being reported. The report id, record id and send settings are passed as parameters into this function and therefore you can implement your own custom logic for each report and record type to determine a contact. Note that the return value Code is not typed and is extra long. This means that the code is not tied to a specific NAV type. This will be covered more in the next chapter.

GetCompanyForReport

Similar to GetContactForReport this function allows you to implement custom logic for determining the "Company No." value. The report id, record id and send settings are passed as parameters to this function and therefore you can implement your own custom logic for each report and record type to determine a company. Note that the return value Code is not typed and is extra long. This means that the code is not tied to a specific NAV type. This will be covered more in the next chapter.

GetHardCopyPrinter

This function is always called to get the printer to use for the current user when the delivery method is set to "Hard Copy". It defaults to using the NAV Printer Selections setting for that user for that report otherwise it uses the user's system default printer. It is provided here to allow you to change this logic.

GetOutputFileName

When a report is printed to Zetadocs, converted to a pdf and sent to a recipient it is desirable to be able to name that pdf file something relevant. This function is called from the AddRecord function in the Zetadocs Send Results Gen codeunit (i.e. once per report record) to allow you to specify independent file names.

GetRecordNoForReport

Similar to the Company No. Field No. and Contact No. Field No. settings in the Zetadocs Report Settings there is an option to specify the Record No. Field No. This field's purpose is primarily for customizing Zetadocs message content. For example it is often desirable to include a Ref. number in the subject of email correspondence. This can be set by adding %%[ZetadocsRecordNo] into the subject of a Zetadocs Template.
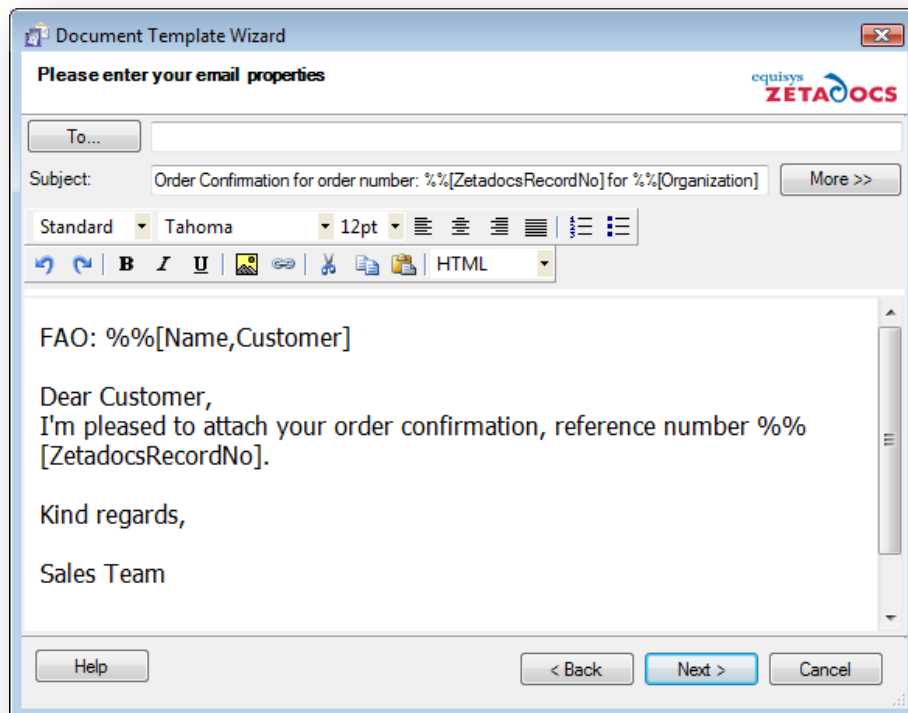
Figure 64 - Zetadocs Template Wizard

Once again this field no. reference setting operates similar to Contact No. Field No. such that if the field is left blank in the Zetadocs Report Settings then this function will be called from the **AddRecord** function in the Zetadocs Send Results Gen codeunit. This may be necessary if your reference number is composed of more than one field value. If so these field values could be concatenated and returned from this function.

GetCompanyRule

This function is exposed here for a number of reasons. Firstly it allows the customization of rules dynamically at runtime but primarily it can used in conjunction with the Company Type Code to provide company rules for bespoke company types (i.e. types other than Customer and Vendor). This is explained in more detail in the next chapter. The important thing to note about this function is the parameter that is passed. The "Zetadocs Company Rule" is another temporary table maintained in the Zetadocs Send Results Gen codeunit. This is used to get the rule override information irrespective of the company type. This will become clearer in the next chapter. It is recommended that you review the implementation of this trigger function in the Zetadocs-Send Integration codeunit to further your understanding.

21. Bespoke Contacts and Company Types

Due to the nature of NAV system installations and the hugely customizable potential it is acceptable that some systems may or may not use the company tables "18 Customer" and "23 Vendor". Similarly some systems may not use the Contact Management Module or the native NAV "5050 Contact" table. These entities may have bespoke tables, this section details how Zetadocs for NAV can be integrated into such systems. This section focuses on the abstract relationship between the "Zetadocs Company Types" table and the tables that represent these types. We will also see how Zetadocs for NAV can be extended to integrate with other existing native company types.

21.1 Company Types

Zetadocs for NAV integrates with two native company types in its initial configuration, Customer and Vendor. However, the code which directly accesses these tables is kept in 2 locations that are public to a NAV VAR. As an example of how one could implement a new bespoke company type or in fact edit one of the existing company types CUST and VEND the following example is presented.

NOTE: the Zetadocs Sales Document Queue form (9009962) operates for the Sales process only and uses direct references to the Customer and Contact names field in the "Sales Header" table. If you have modified the Sales Header table (36) to work with your bespoke Customer and/or Contact implementations then you may need to alter the references to "Sell-to Customer .." and "Sell-to Contact ..." field references.

BANK Example

Consider the business relation BANK. To integrate Zetadocs for NAV with reports that are sent to BANK contacts you would follow these instructions.

- Create a Zetadocs Company Type "BANK"
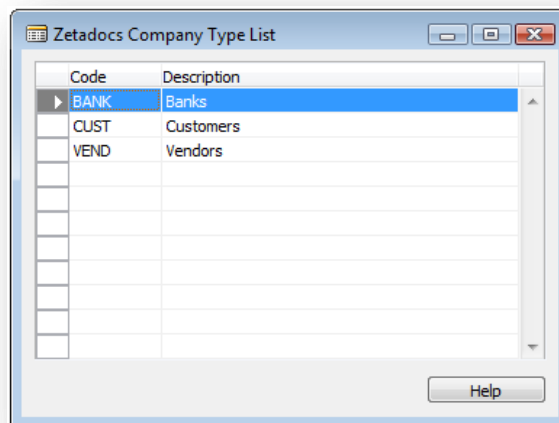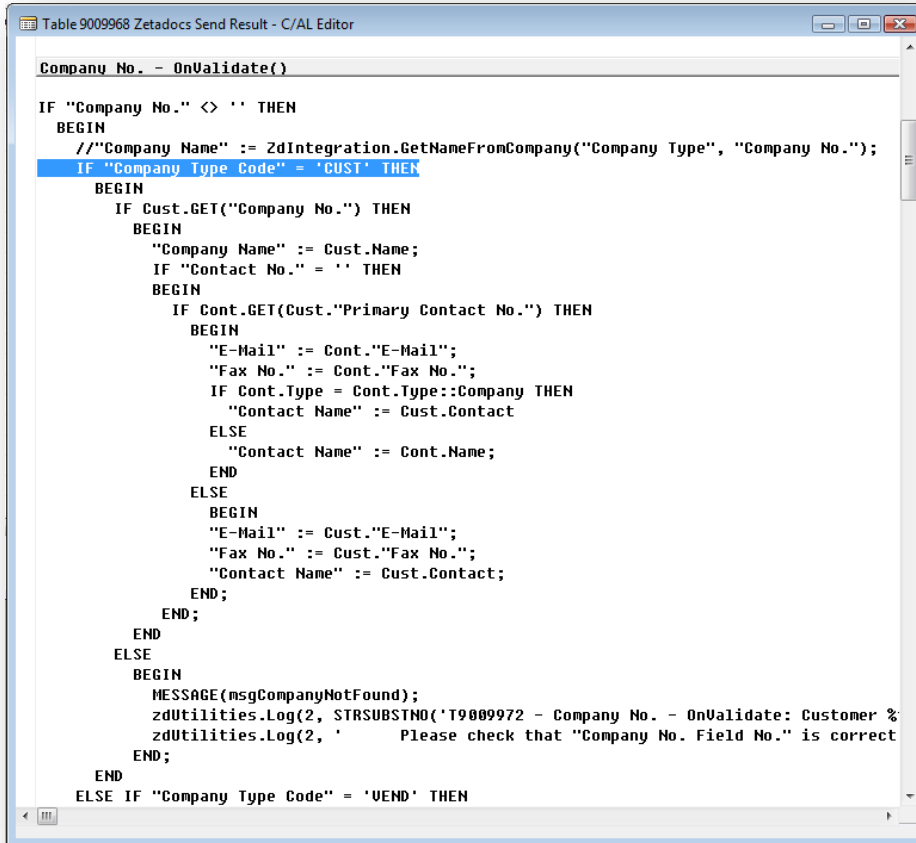
Figure 65 - Zetadocs Company Types

- Implement the BANK "IF" case to get the bank name and addressing information from your bank table in the Zetadocs Send Result table (9009968) similar to the CUST case.

Figure 66 - Zetadocs Send Result Table Code

- Also update the **Company No. - OnLookup** trigger and **Contact No. - OnLookup** trigger to include the IF case for your BANK type.
- Update the **tbContName – OnLookup** trigger in the Zetadocs Delivery Form (9009966) to use the correct ContactBusinessRelation information if necessary.
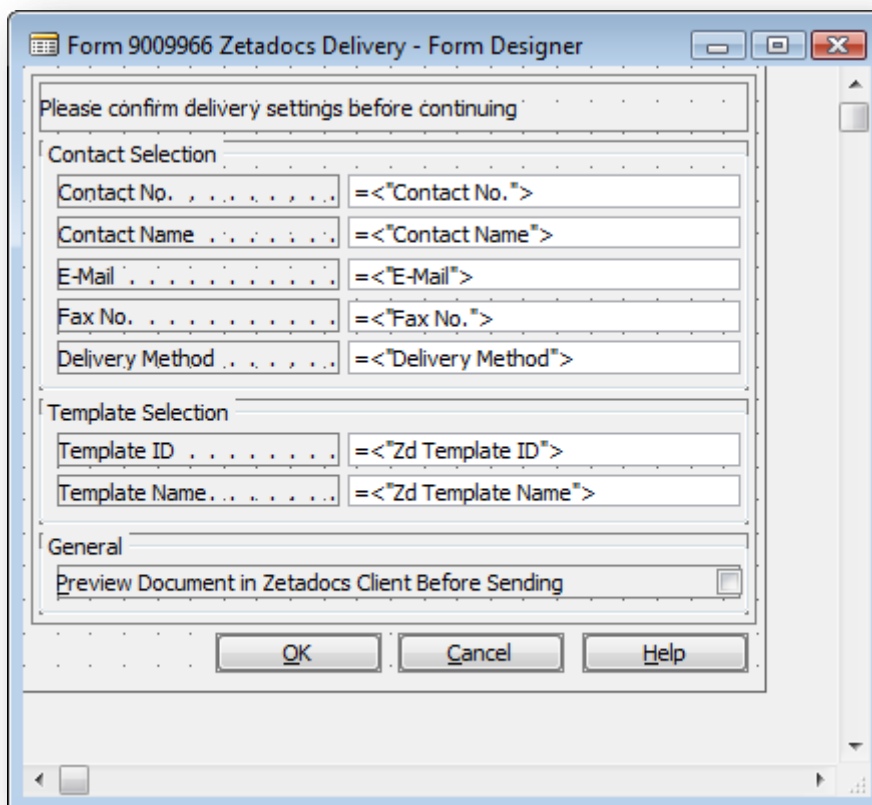
Figure 67 - Zetadocs Delivery Form "tbContName" textbox

- Then in the Zetadocs Report Settings set the BANK Company Type for the report that has BANK recipients and set the respective **"Company No. Field No."** and **"Contact No. Field No."** references for the report source table.
- If you have implemented a bespoke **"Customer"** table for use with Sales and Marketing then you may need to update the Zetadocs Sales Document Queue Form (9009962) to use your bespoke Customer record type references where necessary.

21.2 Contacts

Similar to Company it is possible that there may be a bespoke implementation of Contact information or there may be a requirement to change the default contact address resolution logic of Zetadocs for NAV.

Validating

As has been explained the Zetadocs Report Settings the **"Contact No. Field No."** determines whether the contact reference can be extracted from a field in the record that is passed to the Zetadocs Send Results Gen codeunit or whether this is implemented by the VAR and called from the codeunit. Once the reference has been set in the **"Contact No."** field in the Zetadocs Send Result table the OnValidate trigger is called. Therefore to modify the contact addressing resolution or to change the code to use a bespoke contact table you must follow these instructions:

- Modify the **Contact No. – OnValidate** trigger in the Zetadocs Send Result table (9009968) to get the name and addressing information from your bespoke contact.
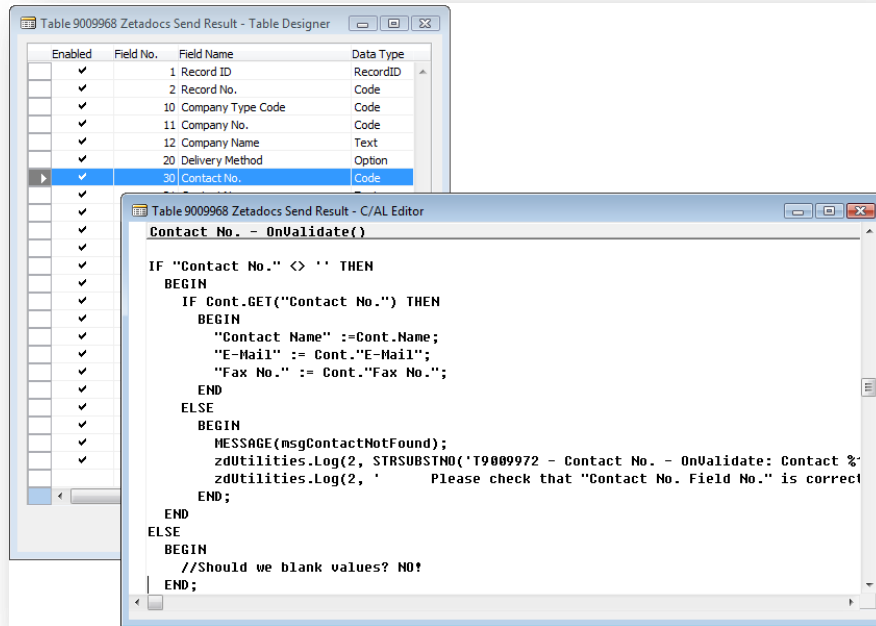
Figure 68 - Zetadocs Send Result table - Contact No. code

- Modify the **Contact No. – OnLookup** trigger in the Zetadocs Send Result table (9009968) to use the correct ContactBusinessRelation information dependant on the **"Company Type Code"**.
- Update the Zetadocs Delivery Form (9009966) references to contact information to use your bespoke contact record type and correct ContactBusinessRelation information if necessary.
- If you have implemented a bespoke **"Customer"** table for use with Sales and Marketing then you may need to update the Zetadocs Sales Document Queue Form (9009962) to use your bespoke contact record type references where necessary.
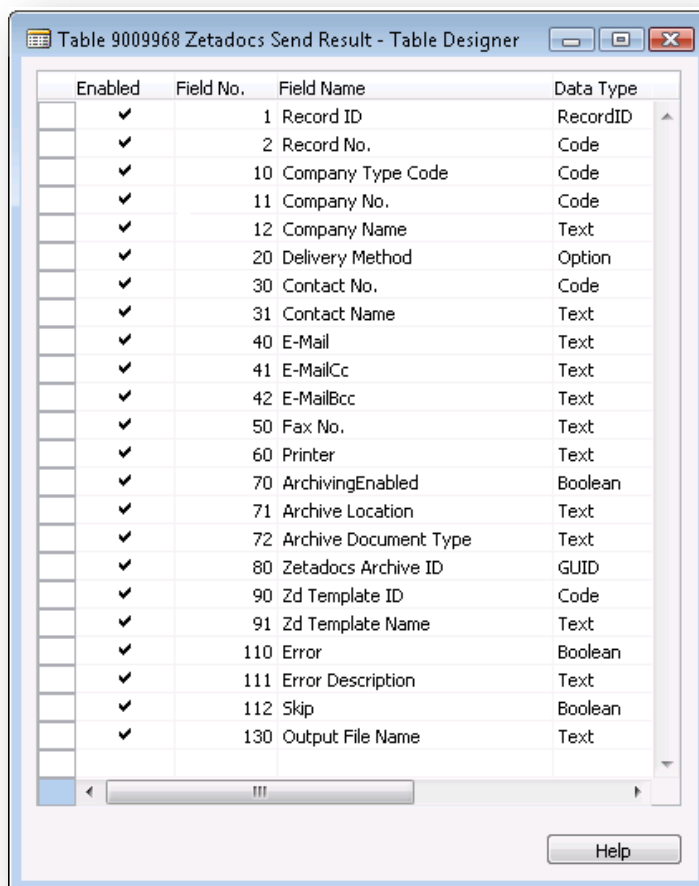
22. Zetadocs-Send Customize codeunit

By now you should have a good idea of what this codeunit is for. Up until now we have been exploring the internal processing and control flow of the Zetadocs for NAV Addin. By using specific settings and writing some code in the Zetadocs-Send Integration codeunit and the Zetadocs Send Result table triggers it is possible to completely integrate and customize Zetadocs for NAV into an NAV system. We have also seen the potential to implement business specific logic into the sending mechanism and expand on the Zetadocs for NAV product functionality. There is still however room to take it further.

This section details the two basic functions in the Zetadocs-Send Customize codeunit (9009962) that allow the implementation of more business specific send logic as well as document formatting and archiving customizations.

22.1 OverrideSendResult

As the name suggests this function gives you the whole send result. At this point the result has been completely resolved by Zetadocs and any custom code that has been implemented by you in the various areas explained earlier in this document. This then allows you to modify the completed record as a whole. The only place the results can be edited after this are in the Zetadocs Delivery Dialogs or the Zetadocs Errors Dialogs depending on your display settings for these dialogs, as specified in the Zetadocs Report Settings (potentially overridden by the OverrideSendSettings in the Zetadocs-Send Integration codeunit). Let's examine the Zetadocs Send Result table a little more closely now for the first time.

Figure 69 - Zetadocs Send Result

Some of these fields will be familiar from having worked with the Zetadocs Company Rule used in the GetCompanyRule trigger function in the Zetadocs-Send Integration codeunit. Let's break them up into their respective parts and get familiar with their use and how we can exploit this to implement our specific business logic and workflow.

Record Fields (1 – 2)

The **Record ID** and **Record No.** represent the typeless and typed references to the record we are sending. Record ID is used by the core processing of Zetadocs for NAV to tie the send results and records together. Record No. is what will ultimately be passed to Zetadocs for use as an external reference by either the recipient or in archiving to SharePoint. For more information on Record No. click here.

Example Usage:

Having the Record ID of what you are sending means you can get that record and query or use values from that record to implement logic for changing other fields in the Zetadocs Send Result.

Company Fields (10 – 12)

These fields and their use should be extremely clear by now. The **Company Type Code** allows us to integrate with native and bespoke company tables such as Customer, Vendor and one of your own design. **Company No.** and **Company Name** are then obvious references to the id and display name of the company.

Delivery Method (20)

This controls the addressing that is selected for sending, E-Mail, Fax or Hard Copy. Some obvious customization possibilities include implementing a company policy such as "Any company sensitive information should not be emailed under any circumstance and should be faxed or printed only." Depending on particular reports or recipients the delivery method could be checked or changed to uphold company policy.

Contact Fields (30 – 31)

In collaboration with the Company fields these fields can integrate with native and bespoke systems for contact addressing information resolution. By setting and validating this field is it possible to pull the information from the contact based on the logic that is implemented in the Zetadocs Send Result table triggers as discussed previously.

Addressing Fields (40 – 60)

Provides the ability to set additional email recipients in the Cc and Bcc fields, these fields are without relationships to the contact and company references that may or may not be present in the send result record. This means that addressing information can be taken from anywhere for the respective email, cc, bcc, fax and print addressing fields. Care should be taken to clear the company and contact no. fields before setting these values manually.

Archiving Fields (70 – 72)

Set in the Zetadocs System Rule that you have associated with a report via the Zetadocs Report Settings, the archiving settings are available for per record modification. This can be used for example in deciding whether or not the document is archived depending on its content or changing the archiving location to a limited permissions document library in SharePoint, or sub categorizing documents using the Zetadocs Archive Document Type.

Properties:
- Archiving Enabled – per document archiving
- Archive Location – the archive connection string takes the following format
- "sharepoint: <site> , <archive library>[/subfolder[/subfolder…]]"
- Archive Document Type – for an in-depth explanation of this please refer to the 'Zetadocs for Microsoft Dynamics NAV SharePoint Components Installation Guide.pdf' on your CD.

Zetadocs Archive ID (80)

WARNING: This field will contain data which contains a reference for an NAV record to archived documents. **It should not be edited or you risk breaking the archive search functionality of Zetadocs for NAV.**

Zetadocs Template Fields (90-91)

The "Zd Template Name" field is set automatically as the "Zd Template ID" field has a table relation with the Zetadocs Template table. The uses of this field are fairly obvious, change the Zetadocs template being used depending on some custom business logic.

Error Fields (110-111)

The Zetadocs Send Result table (9009968) has a trigger function **CheckErrors.** This function is called for each results record in the Zetadocs Send Results Gen codeunit during the **ResolveSendInfo** function. This happens after all possible modifications of the send result values have taken place in the Zetadocs-Send Integration trigger functions and Zetadocs-Send Customize codeunit override function **OverrideSendResult.** This function checks the addressing information (email, fax, and printer) against the specified "Delivery Method" (Email, Fax, Hard Copy) to pre-empt potential send failures in the Zetadocs Client. If an error is found in a Zetadocs Send Result record the "Error" field is set to TRUE and a description of the error written in "Error description". It is possible to implement your own error checks by editing the code in the **CheckErrors** function in the Zetadocs Send Result table. Note that the presence of an just 1 error record in the Zetadocs Send Result record for a particular send will cause the "Zetadocs Batch Delivery Dialog" to display IF the "Zetadocs Send Settings" for that send has "Show Batch Delivery Dialog" set to TRUE otherwise all errors will be marked as Skip = TRUE.

Skip (112)

When Skip = TRUE this will cause the report to use CurrReport.Skip for the associated record. For example if your report contains 3 reports and one is marked to skip then only 2 will be printed to Zetadocs. If the Zetadocs Batch Delivery Dialog is displayed either by there being errors in the send results or by the user choosing to preview the send results, they can manually set a report to skip particular report records.
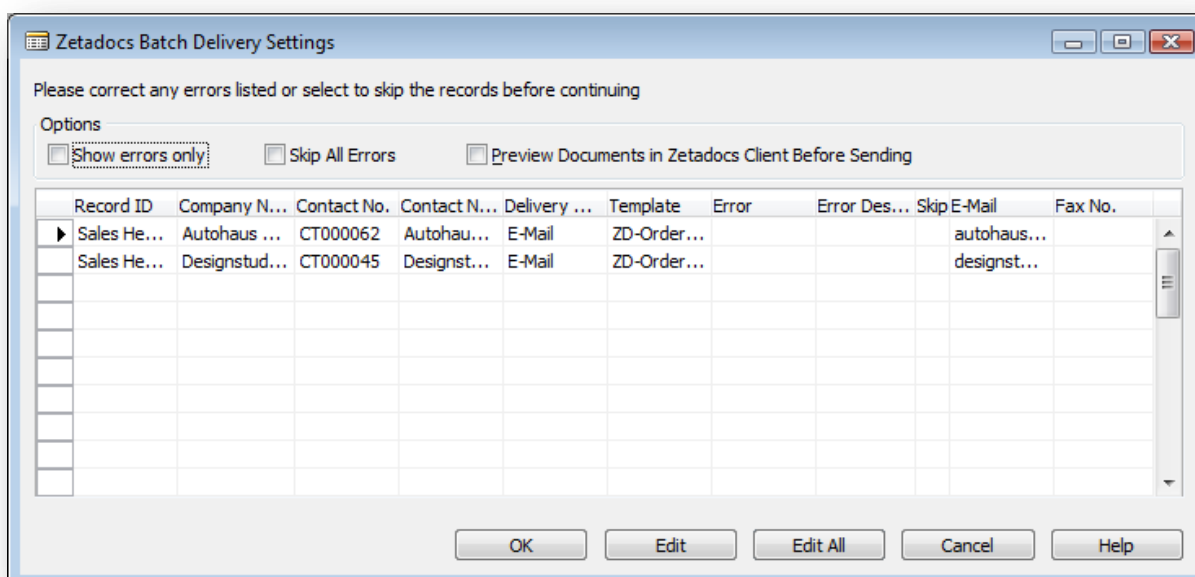
Figure 70 - Zetadocs Batch Delivery Dialog

Output File Name (130)

When a report is printed to Zetadocs and split into the addressable documents each document is given a name. It is desirable to be able to control the name of these documents as it will be the name of the PDF file produced and attached to emails as well as archived to SharePoint. This field allows you to set that document name. A good example of its use would be to generate the name based on the type of report and the record no. For example: *"Order Confirmation: 10045".* Using the RecordID you can retrieve any information about the record for generating the output file name.

22.2 GetAdditionalEmbComms

In the final stage of the reporting process for Zetadocs for NAV the **GetRecordCustComms** function is called from the report on the Zetadocs Send Results Gen codeunit to retrieve the formatted embedded commands which represent the send result for each report record. Internally in the Zetadocs Send Results Gen codeunit we create the Zetadocs embedded commands but before we return it we call this trigger function **GetAdditionalEmbComms** in the Zetadocs-Send Customize codeunit. This allows you to return additional embedded commands which can be used to customize your document message subject and body text as well as additional archive metadata to associate with the document when it is archive.

Dynamic Fields

Dynamic Fields are name/value pairs that can be used to pass any information to Zetadocs. The format of the command is:

> *%%[field: <name>, <value>]*

For Example:

> %%[field: salutation, Mr.]

By using this in conjunction with a Zetadocs Templates you can personalize the message as follows.
%%[field: salutation, Mr.]
%%[field:name, McCarthy]
%%[field: company, Widgets Inc.]
%%[field: quote_number, 1234]
%%[field: myname, Sam]

Document Template

When merged to a document template containing the following text:
Dear %%[salutation] %%[name]
I'm pleased to attach your quotation as discussed along with our conditions of sale and product brochure.
Our quotation number for your reference is %%[quote_number], please include this on your sales order.
Regards,
%%[myname]

Expected Output

Zetadocs creates the following email message body:

Dear Mr. McCarthy
I'm pleased to attach your quotation as discussed along with our conditions of sale and product brochure.
Our quotation number for your reference is 1234, please include this on your sales order.
Regards,
Sam

Archiving Metadata

It is also possible to archive any of the dynamic fields as metadata. To do this the embedded command should include the ARCHIVE flag at the end. Here is the format:

> *%%[field: <name>, <value>, ARCHIVE]*

For Example:

> *%%[field: Postcode, N7 oJE , ARCHIVE]*

Whether the dynamic field is used in personalizing the message or not its value name pair will be passed to the SharePoint archive as a content type column.

There are a couple of things to note about this. If the column name does not exist already in SharePoint it will need to be created as a column of the content type specified, this needs to be done in SharePoint in advance.

Zetadocs documents default to using a "Zetadocs" content type. If you have specified an "Archive Document Type" in either the Zetadocs Document Sets table or the Zetadocs Report Settings table then the content type will be a child type of the Zetadocs content type. NOTE: It is recommended that the SharePoint columns are created before archiving a document and that it is well tested before roll out.

These fields can then be used to search on SharePoint. The Zetadocs-Utilities codeunit exposes a search function which can perform a column search in SharePoint.

SharePointSearch

This command in the Zetadocs utilities will launch your web browser and search the specified field for the specified value.

> *SharePointSearch(Text <fieldname>, Text <fieldvalue>, Boolean <ShowSearchPage>)*

For Example:

> *SharePointSearch('Postcode', 'N7 0JE',FALSE)*

When <ShowSearchPage> is false you will be directed to the search results. When it is true you will be taken to the Zetadocs Search page with the 'Postcode' pre-populated in the search form. This does however require modifying the search page as per the instructions in the Zetadocs for Microsoft Dynamics NAV SharePoint Extensions Installation Guide.

23. Migrating to the live database

At this stage the system configuration and testing of Zetadocs Delivery Essentials should be complete, if these are the only elements to be installed in your system and you have been performing these steps on a test version of your system you can now migrate it to the live database. Otherwise please continue installing any remaining components, there will be details on migrating these systems provided following their install and configuration. The process is very similar to the steps taken in sections 7 and 8 save that the configuration file that you will be importing is now configured to your requirements.
This requires a number of steps:

- Exporting the Configuration
- Exporting any Modified Forms, Tables or Reports
- Importing the Zetadocs for NAV Objects
- Importing any Modified Forms, Tables or Reports
- Importing the xml file with your configuration

23.1 Exporting the Configuration

The Zetadocs Configuration Export form will export all of the configuration data specific to Zetadocs, if you have modified data in other tables this will not be exported.

- From the **Navigation pane** select the **Administration** option.
- From the options that appear, select **Application Setup** and then **Zetadocs Setup**.
- Select the Zetadocs Configuration Export option.
- In the window that appears select a suitable name and location for your configuration export and click **Export**.

23.2 Exporting Modified Forms, Tables or Reports

- Open the Navision client and connect to/open the Navision database.
- Open the **Object Designer** (Tools→Object Designer).
- Click on **All** button in the designer menu.
- Select **All objects (CTRL + A)** or alternatively select those objects you wish to export.
- Select **Export Objects** in file menu (File→Export).
- Export objects to a suitable file e.g. ***Zetadocs for NAV4.1 Export.fob*** file.
- Keep the Zetadocs for NAV4.1 Export.fob in a safe place.

23.3 Importing Zetadocs to the Live NAV System

The steps to import the Zetadocs for NAV system to your live system are the same as those utilised earlier, save that different files are imported. Instead of importing the config.xml file and tables/forms.fob files straight from the Zetadocs for NAV product CD/download you simply select the configuration xml file you created during the export and any modified versions of your tables and forms. The steps below outline this process, for more in depth instructions please review chapters 7 and 8 for more details.

- Import the Zetadocs for NAV Objects fob file created from you test system.
- If you are using Document Archiving import the Zetadocs for NAV v4.1 Interfaces (Tables) fob file relevant to your language and NAV version from your product CD or import the modified tables from your test system.
- If you are using SharePoint Archiving import the Zetadocs for NAV v4.1 Interfaces (Forms) fob file relevant to your language and NAV version from your product CD or import the modified forms from your test system.
- Import the xml file with your configuration from the test system.
- Copy across your Zetadocs Templates.

Once you have imported the configuration you should perform a series of tests like those in chapter 12 to ensure the system have be successfully migrated.

24.   Routine Activities

This section contains details on performing routine tasks and other procedures which may be required to maintain an operable system.

24.1 Operational Checklist

Use these checklists periodically to record operations.

Checklist: System Operation

Follow the checklist to verify system operation.

Completed	Task
	Check the operation of each Zetadocs enabled NAV report.
	Check and verify that messages print to the Zetadocs Client successfully.
	Check and verify that messages deliver successfully.
	Check and verify that messages archive successfully.
	Check the number of documents printed, delivered and archived match.
	Check the operation of each Zetadocs enabled NAV report.

Checklist: Event Logs

Check event logs using the following checklist.

Completed	Task
	Filter application and system logs on each NAV Client to see all Zetadocs errors Note repetitive warning and error logs.
	Filter application and system logs on the SharePoint server to see all Office SharePoint search and crawl errors. Note repetitive warning and error logs
	Respond to discovered failures and problems with the aid of the Troubleshooting section of this guide.

Checklist: Check NAV and SharePoint Backups

Complete this checklist to check supporting systems backups.

Completed	Task
	Ensure that the recommended minimum backup strategy - a daily online backup - is completed.
	Verify that the previous backup operation completed.
	Analyze and respond to errors and warnings during the backup operation.
	Follow the established procedure for tape rotation, labeling, and storage.
	Verify that the transaction logs were successfully purged (if your backup type is purging logs).
	Make sure that backups complete under service level agreements (SLA).

24.2 Security Hardening

Zetadocs for NAV provides the ability to print and send NAV information and in that respect consideration should be made as to ensuring the safety of both the information and the method of delivery. As Zetadocs integrates with Microsoft Dynamics NAV and Microsoft Office Outlook as standard for the source and destination of the information attention should be paid to the access permissions with NAV to particular data. Overall best practices should be followed for the deployment of NAV and Office Outlook.

Similarly the setup and configuration forms within Zetadocs for NAV are recommended for access only by an NAV Administrator and therefore access permission roles should be set up to this effect as with the other areas of NAV. For general advice on Security Hardening for NAV and other general recommendations please refer to the "*Navision Security Hardening Guide*" which is downloadable from http://www.mibuso.com/dlinfo.asp?FileID=474 .

Zetadocs Setup

Some features of Zetadocs for NAV involve the use of shared network folders. It is strongly recommended that only the necessary users are granted access to these folders. Examples of these are: Zetadocs Template folders, Zetadocs Document Queue folders.

The Zetadocs Configuration, which contains details of enabled users, license and location of shared network folders, is stored in the domain partition of Active Directory. Optionally this configuration can be stored on a network share; it is also strongly recommended that only the necessary users are granted access to this folder.

SharePoint Security

If integrating with Microsoft SharePoint as a document archive, consideration should be made as to the access permissions of users to view potentially sensitive archived information. For general security recommendations for Microsoft SharePoint Server please refer to Microsoft documentation. Some information on security hardening can be found here http://technet.microsoft.com/en-us/library/cc262849.aspx .

From Zetadocs for NAV, rules can be setup to change the archive location of documents dependant on type and with the use of the Zetadocs SDK granule and writing some code in the Zetadocs-Customization codeunit per record archive locations can be set dependant on content. For this reason it is recommended to consider access permissions when creating the Zetadocs System Rules.

24.3 Performing a Zetadocs for NAV Backup

This section describes how to perform backups of a Zetadocs for Microsoft Dynamics NAV system. This enables you to safeguard your organizations information resources by holding extra copies in secure locations and enables you to restore your systems following problems with the original data.

How Zetadocs for NAV Backup integrates with NAV Backup

Zetadocs for NAV has additional tables contained within NAV which when NAV is fully backed up will also be included within the backup meaning that there is no additional overhead in performing the standard operation. There are however elements to Zetadocs for NAV which exist separately from NAV which will require additional steps to include in a complete backup.

Document Queues – The Zetadocs Document Queues are centralized folders for processing documents from, in essence a virtual in tray. The Zetadocs Document Queues operates by accessing a shared network folders which contains documents received by NAV via email, fax or scanned from hard copy sources. As the folder is not part of NAV it will not be backed up during an NAV backup as such it is desirable to backup the network folders separately.

SharePoint Archive – If the archiving options in Zetadocs have been configured to archive documents into a SharePoint archive then this to would need to be backed up separately as well to ensure that the record of processed documents is not lost. The backup of this data falls under the standard backup of a SharePoint system and therefore may be part of your existing backup procedure.

Preparations before Backing up

It is important to have a clear strategy for dealing with system backups as it is both business critical and also a legal requirement that backups of essential business data be kept. There are obviously a number of decisions to be made when backing up:

- Identify the data to be backed up
- Frequency and Timing of the Backup
- Storage Format
- Storage Location

Performing an NAV System Backup

To perform a backup follow the standard NAV backup instructions, a full system backup will include both NAV and the Zetadocs elements integrated into NAV.

Backing up the Zetadocs Document Queues

To backup the document queues you need to simply locate the network folders and copy those folders to the assigned storage location for your backup.

- Locate the network folders which contain the contents of your document queues. This will be specified in the Zetadocs Sales Document Queue Form shown below and the Zetadocs Purchase

Document Queue Form.
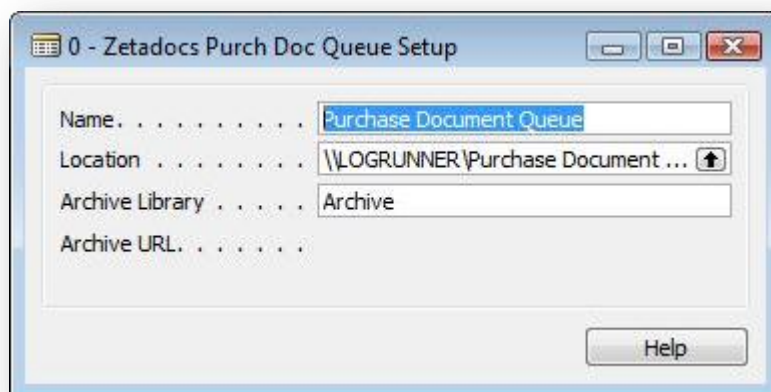
Figure 71 - Zetadocs Purchase Document Queue Setup

- Copy the folders (or the specific elements you desire) to your backup storage location.

Backing up your SharePoint System

Backup of all SharePoint site and document libraries for Zetadocs for NAV are covered in a standard Microsoft SharePoint backup. For more information please refer to:

SharePoint MOSS: Administering backup and recovery for Office SharePoint Server 2007
SharePoint WSS: Administering backup and recovery for Windows SharePoint Services 3.0

Restoring a Zetadocs for NAV system

To restore your Zetadocs for NAV system following problems with the original data you need to restore 3 separate elements. The NAV system backup itself which contains the additional Zetadocs elements, the document queue backup and the SharePoint archive.

Preparations for Restoring your System

It is important to have a clear strategy for dealing with system restorations as it is critical to the business that the system can be restored. There are obviously a number of decisions to be made when restoring the system:
- Identify the storage location for the backup
- Identify which backup data set is to be restored

Restoring your Zetadocs for NAV System

At some point you may need to restore your system using a backup, this will restore the Zetadocs for NAV system excluding the document queue and the SharePoint archive which will be covered later in this guide. To restore your system follow the standard restore instructions as laid down in NAV.

Backups that were exported with the Microsoft Dynamics NAV backup facility can be imported by using Tools, Restore. You should always restore the database backup into a new (empty) database.

Restoring the Document Queues

- Locate the copy of the network folders which contained the contents of your document queues in your backup location.
- Copy the folders (or the specific elements you desire) to the network folders being used for your respective document queues. The location of these folders will be specified within the Zetadocs Sales Document Queue Setup Form and Zetadocs Purchase Document Queue Setup Form.

Restoring your SharePoint System

All SharePoint sites and document libraries for Zetadocs for NAV can be restored using the standard Microsoft SharePoint Restore instructions. For more information please refer to:

SharePoint MOSS: Administering backup and recovery for Office SharePoint Server 2007

SharePoint WSS: Administering backup and recovery for Windows SharePoint Services 3.0

Reinstalling the Zetadocs for NAV SharePoint Extensions

If you have had to completely rebuild your SharePoint system then you will need to reinstall the Zetadocs for NAV SharePoint Extensions after you have restored your SharePoint system.

25.   Upgrading your Zetadocs for NAV system

Upgrading your Zetadocs for NAV system has four main stages shown below which will update your system to the Zetadocs for NAV v4.1 specification. The following process should enable you to upgrade from a Zetadocs for NAV v3.0 system, for details on installing from other versions please contact Equisys technical support at support@equisys.com.

- Zetadocs SharePoint Extensions
- Zetadocs for NAV Client
- Zetadocs for NAV Objects
- Zetadocs for NAV Reports (Optional)

25.1 Preparing to upgrade your Zetadocs for NAV system

You may wish to create a copy of your live system on which to perform the upgrade before migrating it across to your live system.

Creating a copy of your NAV database (optional)

- Open the NAV client and open the database in question.
- From the main menu select **Tools➔Backup**.
- Save a copy of your NAV database in a safe location.
- Select **File➔Database➔New** and create a new duplicate system.
- Next select **Tools➔Restore** and select the backup database you just created.

25.2 Upgrading the Zetadocs SharePoint Extensions

The Zetadocs SharePoint Extensions installer will have provided a set of components that sit on a Windows SharePoint Services (WSS) v3.0 or Microsoft Office SharePoint Server (MOSS) 2007 machine. Briefly, these components comprise of web services, web parts and ASPX pages. To upgrade your SharePoint extensions install you need to uninstall the existing extensions fully and then install the new Zetadocs SharePoint Extension in their place.

SharePoint Extensions

To uninstall the SharePoint extensions you must be logged onto the machine using an account that has SharePoint Site Collection Administrator privileges **for the front-end web application and the Central Administration program**.

To check which accounts are listed as Site Collection Administrators, you should do the following:

- On the SharePoint machine, run the application **SharePoint 3.0 Central Administration** from the Start menu.
- Click on the **Application Management** option in the left-hand navigation panel.
- Select the **Site Collection Administrators** option from the **SharePoint Site Management** section of the page. The resulting page will show you which accounts are listed as the Primary and Secondary Site Collection Administration accounts.

Figure 72 - SharePoint Site Collection Administrators

- Using the **Site Collection** drop-down at the top of this dialog, add your chosen Administrator account to both the Central Administration and front-end Web Applications.

Deactivating the Zetadocs Web Services feature and NAV content types

To deactivate the Zetadocs Web Services feature and NAV content types on the SharePoint sites, you should do the following:

- Open your top-level site in Internet Explorer.
- Choose **Site Settings → Modify All Site Settings** from the Site Actions menu if running MOSS 2007, or Site Settings from the Site Actions menu if running WSS v3.0. *Please note that if the Modify All Site Settings option is not available on a MOSS 2007 machine, you may be logged on as a user with insufficient permissions to activate SharePoint features.*
- Select the **Site Collection Features** option from the Site Collection Administration section.
- Find the **Zetadocs SharePoint Web Services** feature in the list and **Zetadocs Content Types** (NAV) then click the **Deactivate** button for each.

Deactivating the Zetadocs Extensions feature on each site

To deactivate the Zetadocs Extensions feature on each site (including the top-level and Search sites), you should do the following:

- Open the site in Internet Explorer.
- Choose **Site Settings → Modify All Site Settings** from the Site Actions menu if running MOSS 2007, or Site Settings from the Site Actions menu if running WSS v3.0.
- Select the **Site Features** option from the Site Administration section.
- Find the **Zetadocs SharePoint Extensions** feature in the list, and click the **Deactivate** button.

Uninstalling Zetadocs SharePoint Extensions

To uninstall the Zetadocs SharePoint Extensions, you should do the following:

- Browse to **Add/Remove programs**.
- Highlight the **Zetadocs SharePoint Extensions** option.
- Click the **Remove** button.
- The uninstaller will ask 'Are you sure you want to remove Zetadocs SharePoint Extensions from your computer?'
- Select **Yes**.
- Next you need to verify whether the zetadocs wsp files have been successfully removed as in some systems they can remain.
- Open the SharePoint Central Administration and select Operations then Solution Management.
- Should you see any of the Zetadocs wsp files select them and choose **Retract Solution** and once retracted select the **Remove Solution** option to complete the uninstall.

Upgrading the Zetadocs SharePoint Extensions

To upgrade to the latest version of the Zetadocs SharePoint Extension simply follow the standard installation steps from chapter 5.

25.3 Zetadocs for NAV Client

The Zetadocs for NAV Client is installed in 3 separate parts:

- Zetadocs NAV Client
- Zetadocs API Runtime
- Zetadocs PDF

The Zetadocs for NAV Client components are installed through Windows Installer and the upgrade can be performed by running the installer again for Zetadocs NAV version 4.1.

- From your Zetadocs for NAV CD, launch the installer.
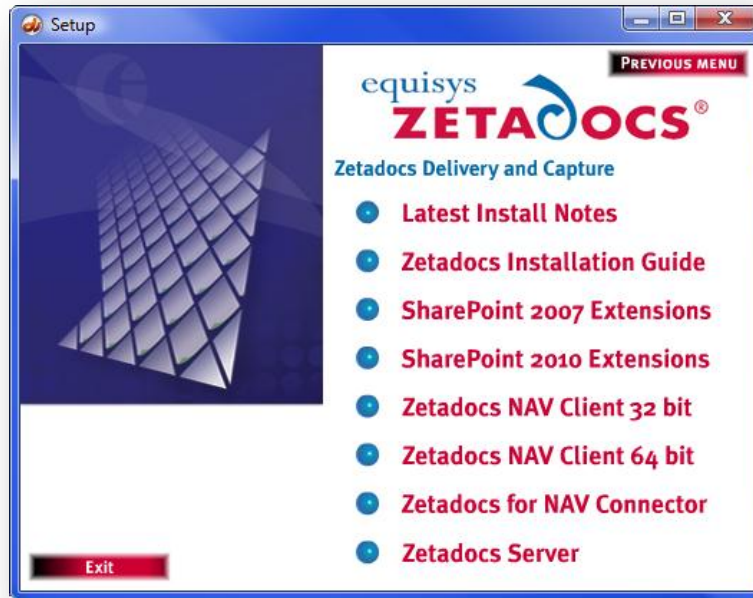
Figure 73 - Zetadocs for NAV Installer

- Select the **Zetadocs NAV Client** (32 or 64 bit) option relevant to your operating environment.
- You may be asked if you want to perform an upgrade of Zetadocs NAV Client. Select **Yes**.
- Follow the instructions of the installer and select **Yes** if asked to install the Zetadocs NAV Client prerequisites of Zetadocs PDF and Zetadocs API Runtime.
- Once the installation is finished, ensure that your license information is still valid for the version of Zetadocs that you are using. You can validate your license by using the Zetadocs PDF Configuration program.

25.4 Zetadocs for NAV Objects

Most of the configuration for Zetadocs version 3.0 will work for Zetadocs version 4.1 once the new objects are imported, but we strongly recommend that the current configuration is backed up for security reasons. The following steps will tell you how to back up the Zetadocs for NAV objects before you upgrade.

- Open the NAV Classic Client and log on to the database.
- Navigate to the (Administration tab → Application Setup →Zetadocs Setup).
- Run the Zetadocs Configuration Export form.
- Run the export to save the configuration data to an XML file.

Note that all the reports that were created for Zetadocs version 3.0 will work with Zetadocs version 4.1 without any modifications. Therefore, there is no need to export them during the upgrade process.

Deleting existing Zetadocs for NAV codeunits

Before you import the new objects you must delete some deprecated codeunits to avoid a name collision during import.

- Open the Navision client and connect to/open the Navision database.
- Open the **Object Designer** (Tool→Object Designer).
- Click on the **Codeunit** button in the Object Designer menu.
- Select codeunits *9009966-Zetadocs Print* and *9009967-Zetadocs Import and Export*
- Click on **Delete** in the Toolbar (F4).
- Click **Yes** to delete selected lines.

You are now ready to import the Zetadocs for NAV 4.1 objects in your database. The instructions given here are for NAV 6.0. You must pick the file that's appropriate for the version of NAV you are using.

- From NAV, import the Zetadocs for NAV 4.1 Objects – NAV6.00.fob file. You will be prompted to

open the Import Worksheet – say No to open the Import Worksheet.
- Once all the Zetadocs for NAV objects have been imported, ensure that the existing configuration has been kept intact by going through the forms of the Zetadocs application setup. Recover configuration from the backup xml file if needed.

25.5 NAV Reports

If upgrading from Zetadocs for NAV v3.0 all reports that have been modified for Zetadocs for NAV will work consistently with version 4.1 and require no modifications.

Note: That you should not select any of your existing modified reports from the Zetadocs Reports Selection Form as this could potentially result in duplication of the Zetadocs Embedded Commands and delivery/archiving problems.

25.6 Zetadocs Server

Clearing the Zetadocs Document Queues

The Zetadocs Document Queue folders contain captured documents and display them in the relevant document queue. The files in the converted folders need to be deleted before the upgrade process.

- Locate the existing Zetadocs for NAV Document Queue Folders. These will be specified in your Zetadocs Sales/Purchase Queue Setup Forms in the Zetadocs Setup → Advanced Settings section of NAV Administration.
- Make sure that the Zetadocs Document Converter service is not running.
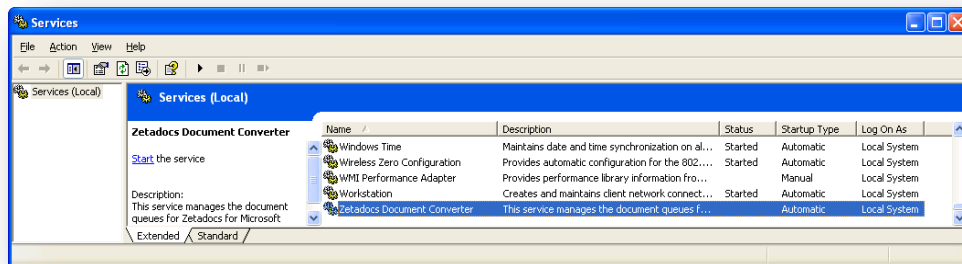
Figure 74 - Services

- Open the document queues and delete all files from the content of the hidden subfolder "_Converted". (To view hidden folders you will need to modify the folder options of Windows)
- Continue with the upgrade.

The Zetadocs Server can be upgraded by running the installation program from the CD, simply:
- Log in with Administrator rights and deactivate the User Account Control (UAC), click here for details on doing this.
- Uninstall your existing copy of the Zetadocs Server via Add/Remove Programs.
- Run the Zetadocs for Microsoft Dynamics software CD or software download.
- Select the install option for your product version from the main menu.
- Then select the Zetadocs Server option.
- The installation program will run, proceed through the wizard and on completion you will be asked to restart your system before the changes can take effect.

25.7 Configuring the upgraded system

As there are new features in Zetadocs for NAV version 4.1 you need to perform some additional configuration to ensure the system works as expected.

Steps required for all systems
- Open NAV and select Administration from the Navigation pane.
- Next choose Zetadocs Setup → Advanced Setting

- Reference Prefix (Delivery Only)
- Choose Zetadocs System Settings.Select the reference prefix field and enter a suitable value, by default this should be ZDRef.
- Document Queue No. Series (Capture Only)
- Next choose the Zetadocs No. Series menu item.
- Create a number series for the Zetadocs Document Queues. We recommend you copy the format for the existing Zetadocs No. Series (E.g. ZDDOCQ).

Capture Setup (Capture Only)

- If you intend to use the drag and drop functionality of Capture then you must configure the archive settings.
- Choose the Zetadocs Sales Capture Setup.
- Configure your archive library and subfoldering preferences
- Repeat for Zetadocs Purchase Capture Setup.

Updating the help files
Zetadocs for NAV comes with its own help files, these have been revised to cover the new functionality and as such should be updated. Please follow the steps in section 6.2 to update your help files.

Enabling the Sales and Purchase Document Queues
Document Queue setup is handled via a pair of Document Queue Setup forms in Zetadocs for NAV v4.1 these need to be checked to ensure they contain the correct settings.

- Open NAV and select Administration from the Navigation pane.
- Next choose Zetadocs Setup → Advanced Setting → Zetadocs Sales Doc. Queue Setup.
- Ensure the fields on the form match the required settings for your document queue.
- Repeat for the Zetadocs Purch Doc. Queue Setup form.
- Next we need to add them to the NAV menusuite as they are not included by default in our mensuite fob any longer, see sections 15.7 and 15.8 for details.

Check the Reports are working
It is a good idea at this point to try printing some of your reports to Zetadocs to verify that they are still working. If not you should re-check that the correct report IDs are set in the Zetadocs Report Settings and that they match the report IDs that are set in the Report Selections for Sales and Purchases.

25.8 Adding new features to the system
To gain access to the new features in Zetadocs for NAVv4.1 you need to perform the additional setup and configuration tasks required for each. Below is a list of those features and the sections of this guide you will need to complete to enable them.

Capture Essentials
The Capture Essentials components will have been added to the system earlier with the NAV object import, to configure how Capture Essentials will operate simply follow the steps in section 10.9. Following that you will need to update your Forms and Pages by following the steps in section 8.2.

Custom Document Queues
To setup a custom document queue simply follow the instructions in chapter 15.

Barcode Recognition
Barcode recognition requires the OCR module be installed, view the section 14.4 on the Zetadocs Server for details on configuring OCR, once done you can perform the actions in chapter 16 to enable barcode recognition.

25.9 Verifying the upgraded system
Having completed the above steps you simply need to populate those fields which were not present in the previous version of Zetadocs for NAV to ensure the system operates as expected.

26. Uninstalling Zetadocs for NAV

26.1 Uninstallation Overview

This section gives an overview of the uninstallation process. Each step is covered in more detail in the following sections of this manual. It is recommended that you follow these steps in order.

- Rollback of NAV Reports
- Uninstalling the Zetadocs for NAV Objects
    - o Remove the Zetadocs for NAV objects and existing object modifications from within Microsoft Dynamics NAV.
- Uninstalling the Zetadocs for NAV Client
- Uninstalling the Zetadocs SharePoint Extensions (Optional- may not have been installed)
    - o Removal of the Zetadocs Archive Document library and uninstallation of the Zetadocs for NAV search web parts.
- Verify all components have been removed successfully
- Uninstalling the Zetadocs Server

26.2 Rollback of NAV Reports

To restore you original report versions you should have either **backed up the original versions** of your reports or you produced new versions of your existing reports with **different report ID's.**

Different Report ID's
- Open the Navision client and connect to/open the Navision database.
- Open the **Object Designer** (Tools→Object Designer).
- Click the **Report** button on the Object Designer.
- Set a filter ***EQ*** on the Version List column.
- Select all Zetadocs reports (CTRL+ A).
- Click on **Delete** in the Toolbar (F4).
- Click **Yes** to delete selected lines.

Restoring Backed Up Reports
- Open the Navision client and connect to/open the Navision database.
- Open the **Object Designer** (Tools→Object Designer).
- Select **Import** Objects in file menu (File→Import).
- Find and select the **Backup of Reports before Zetadocs for NAV4.1.fob** file.
- Choose **Yes** to import all objects.
- Click **No** to open Import Worksheet.
- Click **Replace All**.
- Click **Ok**.

26.3 Removing Zetadocs for NAV Objects

This section details the removal of Zetadocs for NAV objects and editing restored NAV objects back to their original configuration.

Removing changes to existing NAV objects
Before you can import the old object versions you must clear all values in the Zetadocs archive id field in all tables modified by Zetadocs for NAV. A function has been created to help do this in the Zetadocs Integration code unit (9009959). The function is called RemoveArchiveIDFromTables and takes one boolean parameter. If this parameter is set to true, the function will expect all archive id fields to have the number 9009959. If the parameter is false the function will cycle through all tables and all fields looking for the Zetadocs Archive ID field and clearing it out.
Warning, once this function has been run there will be no way to recover the Zetadocs Archive IDs that have been lost and therefore there will be no link between NAV records and reports archived to SharePoint.

To call this function it is suggested that you do the following:
- Create a **new form**.
- Add a button to the form.
- In C/AL Globals, add a variable called **ZDInt** of type codeunit with a subtype of Zetadocs-Send Integration.
- In the on push event for the button add the following code:
  ZDInt.RemoveArchiveIDFromTables(TRUE);
- Save and compile the form.
- Run the form and press the button. You will be prompted if you want to continue. Press Yes if you want to proceed. The Zetadocs Archive ID fields will now have been cleared.
- Delete the form that you just created.

Importing the Backed up objects
- Open the Navision client and connect to/open the Navision database.
- Open the **Object Designer** (Tool→Object Designer).
- Select **Import** Objects in file menu (File→Import).
- Find and select the **Backup of Objects before Zetadocs for NAV4.1.fob** file.
- Choose **Yes** to import all objects.
- Click **No** to open Import Worksheet.
- Put an ***EQ*** filter on column **Existing Object Version List**.
- Click **Replace All**.
- Click **Ok**.

Uninstalling the Zetadocs for NAV Objects
- Click on the All button in the Object Designer menu.
- Put an ***EQ***filter on column **Version List**.
  - Compare the remaining object list with the object list table in the Appendix to ensure you will not delete tables unnecessarily.
- Select table Zetadocs Settings (9009959)

Perform the next steps for all Zetadocs for NAV tables in the following order:
  - 9009963 to 9009982
  - 9009960 to 9009962
- Click **Run**.
- Select all lines (CTRL + A).
- Click on **Delete** in the Toolbar (F4).
- Click **Yes** to delete selected lines.
- Close Table Run (Esc).

Once this has been complete for all tables in the specified ranges.
- Select all Zetadocs for NAV objects (**CTRL+ A**).
- Click on **Delete** in the Toolbar (F4).
- Click **Yes** to delete selected lines.

Note: You may not have permissions to delete all the objects, such as some codeunits. In this case it is ok to leave the codeunits on the system as they will not be used.

26.4 Uninstalling the Zetadocs Client
This section describes how to uninstall the client applications which include the Zetadocs Client, the runtime API and the NAV Extensions. The Zetadocs for NAV Client installation is performed using a combination of installers. You will need to uninstall each of these to remove the Zetadocs for NAV Client. You will need to uninstall the Zetadocs for NAV and the two pre-requisites, the Zetadocs Client and Zetadocs API runtime.
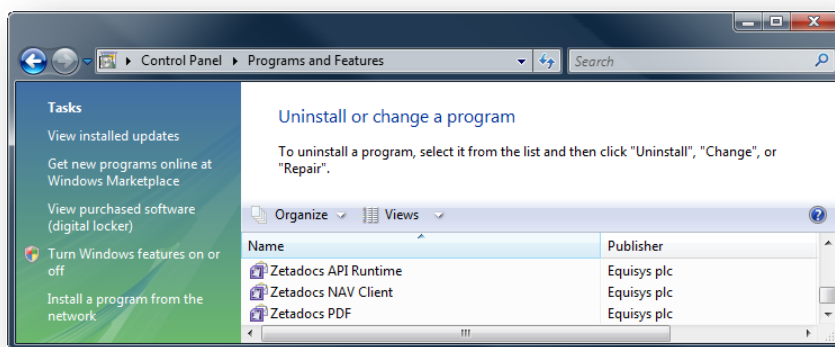
Figure 75 - Add Remove Programs

Open Add/Remove programs (Windows XP) or Programs and Features (Windows Vista) or other uninstallation utility relevant to the environment you are operating in.

- Select Zetadocs NAV Client from the program list and select uninstall.
- Select Zetadocs PDF from the program list and select uninstall.
- Select Zetadocs API Runtime from the program list and select uninstall.

26.5 Uninstalling the Zetadocs SharePoint Extensions

The Zetadocs SharePoint Extensions installer will have provided a set of components that sit on a Windows SharePoint Services (WSS) v3.0 or Microsoft Office SharePoint Server (MOSS) 2007 machine. Briefly, these components comprise of web services, web parts and ASPX pages. The purpose of these components was to provide a means of integrating Zetadocs for NAV with a SharePoint installation.

SharePoint Extensions

To uninstall the SharePoint extensions you must be logged onto the machine using an account that has SharePoint Site Collection Administrator privileges **for the front-end web application and the Central Administration program**.

To check which accounts are listed as Site Collection Administrators, you should do the following:

- On the SharePoint machine, run the application **SharePoint 3.0 Central Administration** from the Start menu.
- Click on the **Application Management** option in the left-hand navigation panel.
- Select the **Site Collection Administrators** option from the **SharePoint Site Management** section of the page. The resulting page will show you which accounts are listed as the Primary and Secondary Site Collection Administration accounts.

Figure 76 - SharePoint Site Collection Administrators

- Using the **Site Collection** drop-down at the top of this dialog, add your chosen Administrator account to both the Central Administration and front-end Web Applications.

Uninstalling Zetadocs SharePoint Extensions

To uninstall the Zetadocs SharePoint Extensions, you should do the following:

- Browse to **Add/Remove programs**.
- Highlight the **Zetadocs SharePoint Extensions** option.
- Click the **Remove** button.
- The uninstaller will ask 'Are you sure you want to remove Zetadocs SharePoint Extensions from your computer?'
- Select **Yes**.
- Next you need to verify whether the zetadocs wsp files have been successfully removed as in some systems they can remain.
- Open the SharePoint Central Administration and select Operations then Solution Management.
- Should you see any of the Zetadocs wsp files select them and choose **Retract Solution** and once retracted select the **Remove Solution** option to complete the uninstall.

26.6 Uninstall Zetadocs for NAV Client Help Files

The Zetadocs for NAV help files should have been copied to the Microsoft Dynamics NAV help folder and given names that will not clash with other help files.
These files were originally:

- addin_a.chm
- addin_a.hh

This folder may have contained other help files which may have used the 'a' post-fix name. As such you should select and open the addin_a.chm file and identify whether it is the Zetadocs for NAV help file. If it is not then try the next unused post-fix letter between a and j until you locate the Zetadocs for NAV help files. Note that the post-fix on both file names must match. (e.g. addin_f.chm and addin_f.hh) Once identified these files should be deleted from:

Program Files\Microsoft Dynamics NAV\CSIDE Client\ENG

Or removed from the equivalent installation folder of Microsoft Dynamics NAV on the machine.

26.7 Uninstalling the Zetadocs Server

The Zetadocs Server converts items placed into the document queues into pdf format, to remove it follow the steps below.

- Open Programs and Features (Windows Server 2008) or other uninstallation utility relevant to the environment you are operating in.
- Select Zetadocs Server from the program list and select uninstall.
- Some files are created after installation of the Zetadocs Server, to ensure all related files are removed, delete the Zetadocs Server folder. This is by default located in the Program Files directory.

27.APPENDIX

27.1 Troubleshooting

This section provides help with resolving common problems with the system. To assist in trouble shooting problem with the Zetadocs system there are a number of log files which can help diagnose a problem or assist in getting the configuration of the system correct.

NAV Logging

Ensure that Logging Enabled is ticked ON in the Zetadocs System Settings Form. The Logging Level determines the amount of information written to the log file. For general configuration and trouble shooting, WARNING or ERROR should suffice. The NAV log is saved to the users temp folder location. This can be found by either pressing Start→Run, then type *%Temp%* and press OK; or manually browse to *C:\Users\<username>\AppData\Local\Temp(Vista) or C:\Documents and Settings\<username>\Local\Temp(XP)* directory.

There are two logs produced by the Zetadocs for NAV Addin.

- ZdExternalUtilitiesDll.log – logging of document queue actions and external calls to Zetadocs API. Only valid for troubleshooting issues with Equisys.
- ZetadocsNAV.log – standard logging of activity that occurs in the Zetadocs for NAV objects.

The content of the Zetadocs for NAV tables can also be exported to help when troubleshooting issues. A single text file is created and includes the version of all the Zetadocs for NAV objects that are currently installed on the system, as well as the content of the tables (report settings, system settings, etc.). The following steps explain how to create the version report file.

Actions:

- From the Administration pane, select Application Setup\Zetadocs Setup\About Zetadocs for NAV.
- Select the "Save Version Report" button.
- Save the text file locally.
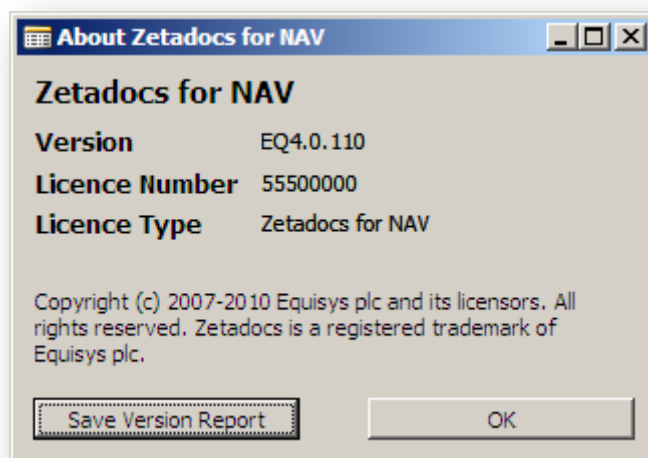
<p align="center">*Figure 77 – Zetadocs About Box*</p>

The version report created can be printed directly to Zetadocs PDF. It will already be addressed to Equisys technical support. If using NAV 6.01 this action must be performed from the classic client.

Zetadocs Client

Please refer to the Zetadocs Client help for information on client logging.

Zetadocs API

The Zetadocs API runtime, which is used as part of the Zetadocs for NAV addin logs information to the users Zetadocs folder. Its contents are usually of value when troubleshooting issues with Equisys.
It can be found at:

- C:\Users\<username>\AppData\Local\Equisys/Zetadocs PDF/ZdApi.log(Vista)
- C:\Documents and Settings\<username>\Local\ApplicationData\Equisys\Zetadocs PDF\ZdApi.log

(XP).

Object ID collisions when importing the Zetadocs objects .fob file

Unless you are re-importing the objects or performing an upgrade it is unlikely that you will come across an ID collision. If you do, please continue and view the recommendations of the import collision wizard in NAV. It is not recommended to undertake collision resolution unless you are an experienced NAV consultant.

Some objects fail to compile during import of the Zetadocs objects .fob file

Most likely this is due to not having installed the Zetadocs for NAV Client on the machine you are using to import the Zetadocs objects from. Many of the codeunits in Zetadocs for NAV use automation components which must be installed prior to importing to ensure that all objects compile successfully.
Things to check for (in order):

- You have installed the Zetadocs for NAV Client on the machine you are using to import the Zetadocs objects
- You are logged in as the user who installed the Zetadocs for NAV Client
- If the above are true but you are still having problems try uninstalling and re-installing the Zetadocs for NAV Client

When you run the Customer/Vendor Card no information is displayed in the Zetadocs tab

Copy and pasting the Zetadocs subform control on to the Zetadocs tab should copy all required subform links. If you are experiencing problems check the following property values on the subform control on the Zetadocs tab:

- **SubFormID**: Zetadocs Customer Rule Subform
- **SubFormLink:** Customer No.=FIELD(No.),Zd Rule ID No.=CONST(0)

OR For Vendors

- **SubFormID**: Zetadocs Vendor Rule Subform
- **SubFormLink:** Vendor No.=FIELD(No.),Zd Rule ID No.=CONST(0)

SharePoint Logging

The logs for Zetadocs activity on your SharePoint site can be found in the following locations:

SharePoint 2007 Systems
C:\Program Files\Common Files\Microsoft Shared\web server extensions\12\LOGS\Zetadocs

SharePoint 2010 Systems
C:\inetpub\wwwroot\wss\VirtualDirectories\80\%CommonProgramFiles%\Microsoft Shared\Web Server Extensions\14\LOGS\Zetadocs

27.2 Zetadocs for NAV Object List

Type	ID	NAME	Status
Table	9009959	Zetadocs System Settings	New
Table	9009960	Zetadocs Template	New
Table	9009961	Zetadocs Document Queue Item	New
Table	9009962	Zetadocs Sales Document Queue	New
Table	9009963	Zetadocs System Rule	New
Table	9009964	Zetadocs Customer Rule	New
Table	9009965	Zetadocs Report Settings	New
Table	9009966	Zetadocs Document Set	New
Table	9009968	Zetadocs Send Result	New
Table	9009970	Zetadocs No. Series	New
Table	9009971	Zetadocs Vendor Rule	New
Table	9009973	Zetadocs Company Type	New
Table	9009974	Zetadocs Company Rule	New
Table	9009975	Zetadocs Send Settings	New
Table	9009976	Zetadocs Sys. Rule Recip. Line	New
Table	9009977	Zetadocs Cus. Rule Recip. Line	New
Table	9009978	Zetadocs Ven. Rule Recip. Line	New

Type	ID	NAME	Status
Table	9009979	Zetadocs Company Rul Rcp. Line	New
Table	9009982	Zetadocs Purch. Doc. Queue	New
Table	9009983	Zetadocs Report Mappings	New
Table	9009989	Zetadocs Document Queue	New
Table	9009990	Zetadocs Doc. Queue Menu Item	New
Table	9009991	Zetadocs Doc. Queue Actions	New
Table	9009992	Zetadocs Archive Context	New
Table	9009993	Zetadocs Archive Metadata	New
Table	9009994	Zetadocs Archive Settings	New
Table	9009995	Zetadocs Doc. Q. Item Barcode	New
Table	9009996	Zetadocs Archive Result	New
Table	9009997	Zetadocs Link Result	New
Table	9009998	Zetadocs Doc. Queue Item	New
Table	9009999	Zetadocs Related Documents	New
Table	9010000	Zetadocs Printed Records	New
Table	9010001	Zetadocs Sales Drag & Drop	New
Table	9010002	Zetadocs Purchase Drag & Drop	New
Form	9009959	Zetadocs System Settings	New
Form	9009960	Zetadocs Template Card	New
Form	9009961	Zetadocs Template List	New
Form	9009962	Zetadocs Sales Document Queue	New
Form	9009963	Zetadocs System Rule card	New
Form	9009964	Zetadocs Customer Rule Subform	New
Form	9009965	Zetadocs Report Settings List	New
Form	9009966	Zetadocs Delivery	New
Form	9009967	Zetadocs Batch Delivery	New
Form	9009968	Zetadocs Batch Errors	New
Form	9009969	Zetadocs Document Sets	New
Form	9009970	Zetadocs System Rule List	New
Form	9009971	Zetadocs Customer Rule Card	New
Form	9009972	Zetadocs Customer Rule List	New
Form	9009973	Zetadocs No. Series	New
Form	9009974	Zetadocs Sales Doc Queue Setup	New
Form	9009975	Zetadocs Printer Reminder	New
Form	9009976	Zetadocs Vendor Rule Subform	New
Form	9009977	Zetadocs Vendor Rule Card	New
Form	9009978	Zetadocs Vendor Rule List	New
Form	9009979	Zetadocs Report Settings Card	New
Form	9009980	Zetadocs Company Type List	New
Form	9009981	Zetadocs Configuration Import	New
Form	9009982	Zetadocs Purch. Document Queue	New
Form	9009983	Zetadocs Purch Doc Queue Setup	New
Form	9009984	Zetadocs Document Set Card	New
Form	9009985	Zetadocs About Box	New
Form	9009986	Zetadocs Sys. Rul Rcp. Subform	New
Form	9009987	Zetadocs Cus. Rul Rcp. Subform	New
Form	9009988	Zetadocs Ven. Rul Rcp. Subform	New
Form	9009989	Zetadocs Cust. Rule Cont. Info	New
Form	9009990	Zetadocs Cust. Rule Temp. Info	New
Form	9009991	Zetadocs Vend. Rule Cont. Info	New
Form	9009992	Zetadocs Vend. Rule Temp. Info	New
Form	9009993	Zetadocs Cus. Add Rcp. Info.	New
Form	9009994	Zetadocs Ven. Add Rcp. Info.	New
Form	9009995	Zetadocs Delivery Edit	New
Form	9009996	Zetadocs Report Mappings List	New
Form	9009997	Zetadocs Report Mappings Card	New
Form	9009998	Zetadocs Report Selections	New

Type	ID	NAME	Status
Form	9009999	Zetadocs Configuration Export	New
Form	9010000	Zetadocs Document Queue	New
Form	9010001	Zetadocs Doc. Queue Select	New
Form	9010002	Zetadocs Doc. Queue Action Sel	New
Form	9010003	Zetadocs Document Queue Card	New
Form	9010004	Zetadocs Document Queue List	New
Form	9010005	Zetadocs Doc Q Menu Items Sub	New
Form	9010006	Zetadocs Doc. Queue Actions	New
Form	9010007	Zetadocs Related Documents	New
Form	9010008	Zetadocs Sales Capture Setup	New
Form	9010009	Zetadocs Purch Capture Setup	New
XMLPort	9009959	Zetadocs Xml Port	New
Codeunit	9009959	Zetadocs-Utilities	New
Codeunit	9009960	Zetadocs-Send Results Gen	New
Codeunit	9009962	Zetadocs-Send Customize	New
Codeunit	9009963	Zetadocs-Send Integration	New
Codeunit	9009964	Zetadocs-Capture Customize	New
Codeunit	9009965	Zetadocs-Capture Integration	New
Codeunit	9009970	Zetadocs-Capture	New
Codeunit	9009971	Zetadocs-Report Printing	New
Codeunit	9009972	Zetadocs-Import and Export	New
Codeunit	9009973	Zetadocs-Automation	New
Codeunit	9009974	Zetadocs-Send	New
Menusuite	55	Zetadocs for NAV	New

NAV 6.01 Objects:

Type	ID	NAME	Status
Page	9009961	Zetadocs Template List	New
Page	9009962	Zetadocs Sales Document Queue	New
Page	9009966	Zetadocs Delivery	New
Page	9009967	Zetadocs Batch Delivery	New
Page	9009968	Zetadocs Batch Errors	New
Page	9009969	Zetadocs Document Sets	New
Page	9009971	Zetadocs Customer Rule Card	New
Page	9009972	Zetadocs Customer Rule List	New
Page	9009975	Zetadocs Printer Reminder	New
Page	9009977	Zetadocs Vendor Rule Card	New
Page	9009978	Zetadocs Vendor Rule List	New
Page	9009982	Zetadocs Purch. Document Queue	New
Page	9009985	Zetadocs About Box	New
Page	9009987	Zetadocs Cus. Rul Rcp. Subform	New
Page	9009988	Zetadocs Ven. Rul Rcp. Subform	New
Page	9009989	Zetadocs Cust. Rule Cont. Info	New
Page	9009990	Zetadocs Cust. Rule Temp. Info	New
Page	9009991	Zetadocs Vend. Rule Cont. Info	New
Page	9009992	Zetadocs Vend. Rule Temp. Info	New
Page	9009993	Zetadocs Cus. Add Rcp. Info.	New
Page	9009994	Zetadocs Ven. Add Rcp. Info.	New
Page	9009995	Zetadocs Delivery Edit	New
Page	9010000	Zetadocs Document Queue	New
Page	9010001	Zetadocs Doc. Queue Select	New
Page	9010002	Zetadocs Doc. Queue Action Sel	New
Page	9010003	Zetadocs Related Documents List	New
Page	9010007	Zetadocs Related Documents	New

Existing Objects:

Type	ID	NAME	Status
Table	18	Customer	Modified
Table	36	Sales Header	Modified
Table	112	Sales Invoice Header	Modified
Table	114	Sales Cr.Memo Header	Modified
Table	110	Sales Shipment Header	Modified
Table	6660	Return Receipt Header	Modified
Table	23	Vendor	Modified
Table	38	Purchase Header	Modified
Table	122	Purch. Inv. Header	Modified
Table	124	Purch. Cr. Memo Hdr.	Modified
Table	120	Purch. Rcpt. Header	Modified
Table	6650	Return Shipment Header	Modified
Form	21	Customer Card	Modified
Form	41	Sales Quote	Modified
Form	42	Sales Order	Modified
Form	43	Sales Invoice	Modified
Form	44	Sales Credit Memo	Modified
Form	507	Blanket Sales Order	Modified
Form	6630	Sales Return Order	Modified
Form	130	Posted Sales Shipment	Modified
Form	132	Posted Sales Invoice	Modified
Form	134	Posted Sales Credit Memo	Modified
Form	6660	Posted Return Receipt	Modified
Form	26	Vendor Card	Modified
Form	49	Purchase Quote	Modified
Form	50	Purchase Order	Modified
Form	51	Purchase Invoice	Modified
Form	52	Purchase Credit Memo	Modified
Form	509	Blanket Purchase Order	Modified
Form	6640	Purchase Return Order	Modified
Form	138	Posted Purchase Invoice	Modified
Form	6650	Posted Return Shipment	Modified
Form	140	Posted Purchase Credit Memo	Modified
Form	136	Posted Purchase Receipt	Modified
Page	21	Customer Card	Modified
Page	26	Vendor Card	Modified
Page	41	Sales Quote	Modified
Page	42	Sales Order	Modified
Page	43	Sales Invoice	Modified
Page	44	Sales Credit Memo	Modified
Page	49	Purchase Quote	Modified
Page	50	Purchase Order	Modified
Page	51	Purchase Invoice	Modified
Page	52	Purchase Credit Memo	Modified
Page	130	Posted Sales Shipment	Modified
Page	132	Posted Sales Invoice	Modified
Page	134	Posted Sales Credit Memo	Modified
Page	136	Posted Purchase Receipt	Modified
Page	138	Posted Purchase Invoice	Modified
Page	140	Posted Purchase Credit Memo	Modified
Page	507	Blanket Sales Order	Modified
Page	509	Blanket Purchase Order	Modified
Page	6630	Sales Return Order	Modified
Page	6640	Purchase Return Order	Modified
Page	6650	Posted Return Shipment	Modified
Page	6660	Posted Return Receipt	Modified

The table shown below gives the standard field no. values to use for reports based on the following tables and the figure shows some example report settings.

Table No.	Table Name	Company Type	Company No. Field No.	Contact No. Field No.	Record No. Field No.
18	Customer	CUST	1	5049	1
36	Sales Header	CUST	2	5052	3
112	Sales Invoice Header	CUST	2	5052	3
114	Sales Cr.Memo Header	CUST	2	5052	3
110	Sales Shipment Header	CUST	2	5052	3
6660	Return Receipt Header	CUST	2	5052	3
23	Vendor	VEND	1	5049	1
38	Purchase Header	VEND	2	5052	3
120	Purch. Rcpt. Header	VEND	2	N/A – leave as '0'	3
122	Purch. Inv. Header	VEND	2	5052	3
124	Purch. Cr. Memo Hdr.	VEND	2	N/A – leave as '0'	3
6650	Return Shipment Header	VEND	2	N/A – leave as '0'	3

27.3 Zetadocs for NAV Menusuite

The menusuite changes listed here are a general guideline for giving regular or administrator NAV user's access to the Zetadocs features and configuration forms. It is up to the installer what level of access permissions are given to configuration forms after they finish the installation. It is assumed, that in situations where a system administrator in the client company has an understanding of the Zetadocs for NAV system and is capable of editing the rules and settings, that access to these forms would remain for the system administrator after installation.

The following table shows the list of menu items and groups to be created using the Navigation Pane Designer (Alt + F12) for configuration. As mentioned before, it may be preferable to remove some of the items on completion of installation and configuration. This is should be decided by the installer.

Type	Caption	Location	Object Type and ID
Group	Zetadocs Setup	Administration\Application Setup (Group)	
Item	Zetadocs No. Series	Administration\Application Setup\Zetadocs Setup (Group)	Form 9009973 – Zetadocs No. Series
Item	Zetadocs System Settings	Administration\Application Setup\Zetadocs Setup (Group)	Form 9009959 – Zetadocs System Settings
Item	Zetadocs Templates	Administration\Application Setup\Zetadocs Setup (Group)	Form 9009960 – Zetadocs Template Card
Item	Zetadocs Document Sets	Administration\Application Setup\Zetadocs Setup (Group)	Form 9009984 – Zetadocs Document Set Card
Item	Zetadocs System Rules	Administration\Application Setup\Zetadocs Setup (Group)	Form 9009963 – Zetadocs System Rule Card
Item	Zetadocs Customer Rules	Administration\Application Setup\Zetadocs Setup (Group)	Form 9009971 – Zetadocs Customer Rule Card
Item	Zetadocs Vendor Rules	Administration\Application Setup\Zetadocs Setup (Group)	Form 9009977 – Zetadocs Vendor Rule Card

Type	Caption	Location	Object Type and ID
Item	Zetadocs Report Settings	Administration\Application Setup\Zetadocs Setup (Group)	Form 9009965 – Zetadocs Report Settings
Item	Zetadocs Sales Doc. Queue Setup	Administration\Application Setup\Zetadocs Setup (Group)	Form 9009974 – Zetadocs Sales Doc Queue Setup
Item	Zetadocs Purch. Doc. Queue Setup	Administration\Application Setup\Zetadocs Setup (Group)	Form 9009983 – Zetadocs Purch Doc Queue Setup
Item	Zetadocs Company Types	Administration\Application Setup\Zetadocs Setup (Group)	Form 9009980 – Zetadocs Company Type List
Item	Zetadocs Configuration Import	Administration\Application Setup\Zetadocs Setup (Group)	Form 9009981 – Zetadocs Configuration Import
Item	About Zetadocs for NAV	Administrator\Application Setup\Zetadocs Setup (Group)	Form 9009985 – Zetadocs About Box

Zetadocs for NAV Role Tailored Client Menusuite Changes

Type	Caption	Location	Object Type and ID
Group	Zetadocs Setup	Administration\Application Setup (Group)	
Item	Zetadocs Customer Rules	Administration\Application Setup\Zetadocs Setup (Group)	Page 9009971 – Zetadocs Customer Rule Card
Item	Zetadocs Vendor Rules	Administration\Application Setup\Zetadocs Setup (Group)	Page 9009977 – Zetadocs Vendor Rule Card
Item	About Zetadocs for NAV	Administrator\Application Setup\Zetadocs Setup (Group)	Page 9009985 – Zetadocs About Box

27.4 Installing in a Terminal Services Environment

Follow the steps below to ensure successful installation in a Terminal Services Environment.

Overview of Installation:
- Checking that your scenario is supported.
- Ensure you are logged in as an Administrator.
- Ensure the Terminal Server is set to Application Server/Terminal Server mode.
- Ensure the permissions are granted to install kernel-mode printer drivers on Windows 2003 systems.
- Install the Zetadocs Client through Add/Remove programs (directly on the terminal server and not from within an RDP session). NOTE: this pre-requisite of the Zetadocs NAV client needs to be installed separately to ensure the printer driver install correctly.
- Install the Zetadocs NAV client through Add/Remove programs (directly on the terminal server and not from within an RDP session).
- Testing the Zetadocs NAV client.

On some systems due to default Windows security settings, Zetadocs PDF printer drivers are not automatically installed. The following information will allow you to manually configure these drivers.

Check that your scenario is supported

Firstly you need to verify that your intended scenario is supported.

Supported Scenarios

Remote Session mode
An application (e.g. NAV) and Zetadocs are installed onto the terminal server. A single remote session is opened onto the server. The user opens an application (e.g. NAV) in the remote session, and prints to the Zetadocs PDF printer. Zetadocs client will launch automatically within the remote session. Zetadocs is able to start Microsoft Outlook in the remote session.

Published Application mode
An application (e.g. NAV) and Zetadocs client are installed onto the terminal server. An application (e.g. NAV) runs as a published application and prints to the Zetadocs PDF printer. In this scenario Zetadocs client starts up in the same window as the published application. When both applications terminate, the published application window closes down automatically.

Unsupported Scenarios

Remote mode
An application (e.g. NAV) is installed on a client machine and Zetadocs is installed on the terminal server. An application (e.g. NAV) is opened on the client but not within a remote session. The client application is still able to see the shared Zetadocs PDF printer on the remote server. However, the application cannot print to the printer in this case.

Mixed mode
An application (e.g. NAV) is installed on the terminal server and the Zetadocs client is installed on a client machine. In this mode, NAV runs as a published application (in a remote session) and prints to the Zetadocs PDF printer. The user starts up Zetadocs client on the client machine (not in a remote session). In this scenario the client is unable to pick up the printed files from the server and so this scenario is not supported.

Ensure you are logged in as an Administrator
Log on to the terminal server system as a user with administrative rights.

Ensure that the Terminal Server is set to Application Server/Terminal Server mode
Before installation, the terminal server must be switched into Terminal Server mode (Windows 2003). See http://support.microsoft.com/default.aspx?scid=kb;en-us;306626& sd=tech for more details.

Ensure permissions are granted to install kernel-mode printer drivers (Windows 2003 only)
- From the **Start menu** select **run**.
- In the run dialog type **gpedit.msc** and press **OK**.
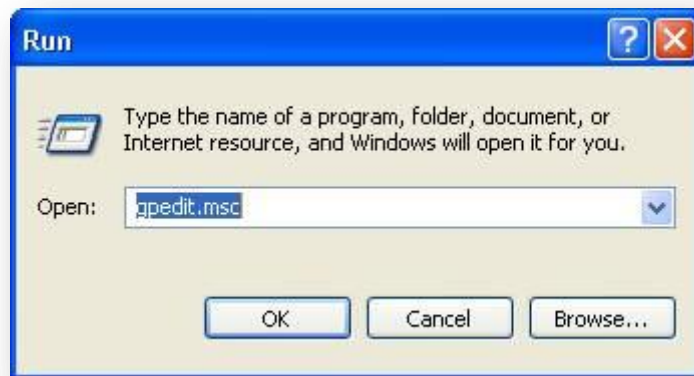
Figure 78 – Run window

- Browse to the disallow installation of printers using kernel-mode drivers option in **Computer configuration\Adminstrative Templates\Printers**:
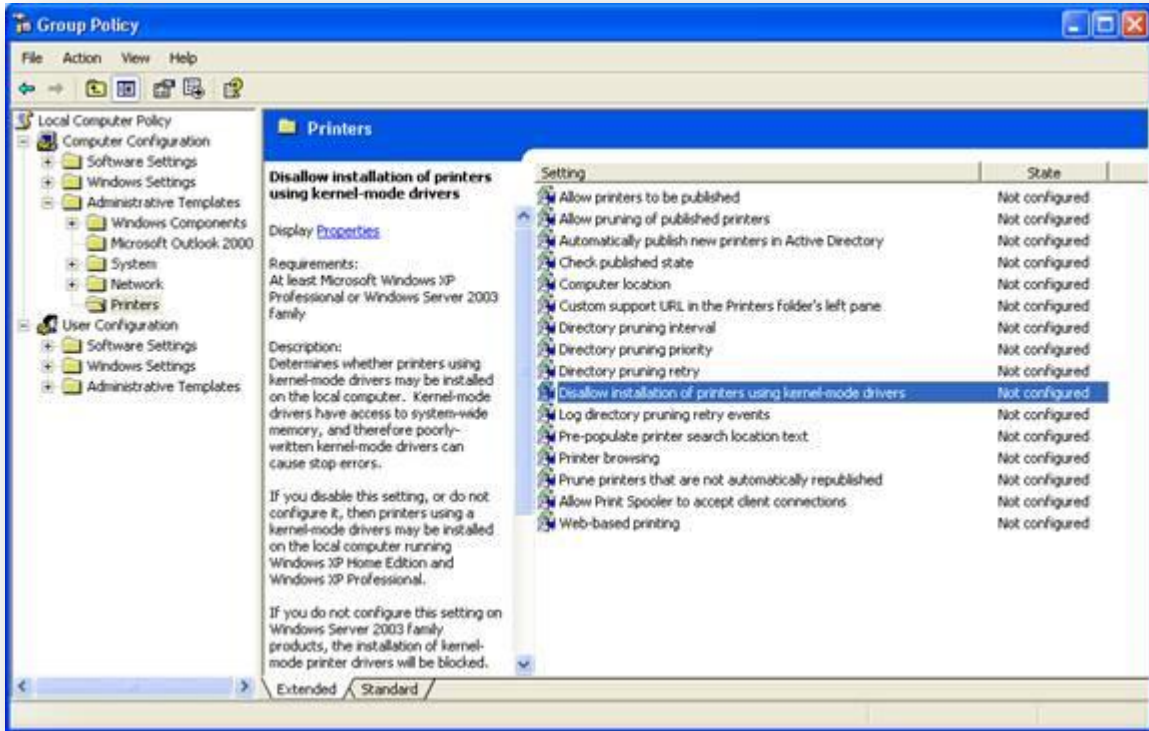
Figure 79 – Group Policy

- Use the right click menu to open the **Properties** dialog.
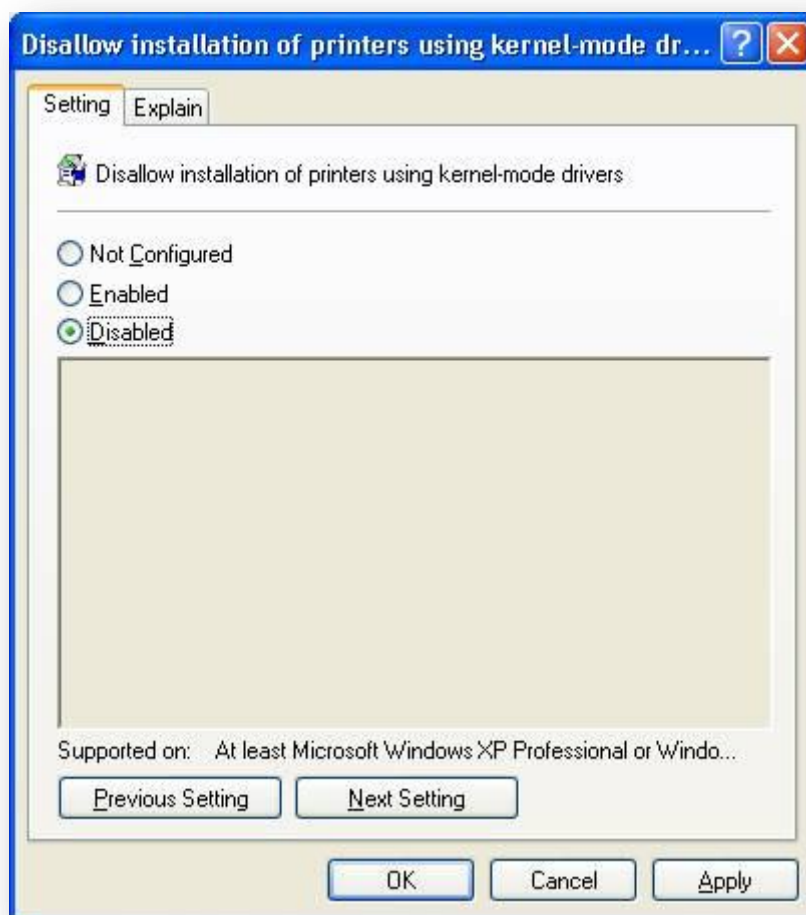- Set this option to **Disabled** and select **OK.**

Figure 80 - Properties

Install Zetadocs Client through Add/Remove programs

Note: Installing the Zetadocs Client application and printers should be done by logging onto the terminal server system and not via a terminal session.

- Start the **Add or Remove Programs** control panel applet.
- Click on **Add New Programs** then click on the **CD or Floppy**. (as below)
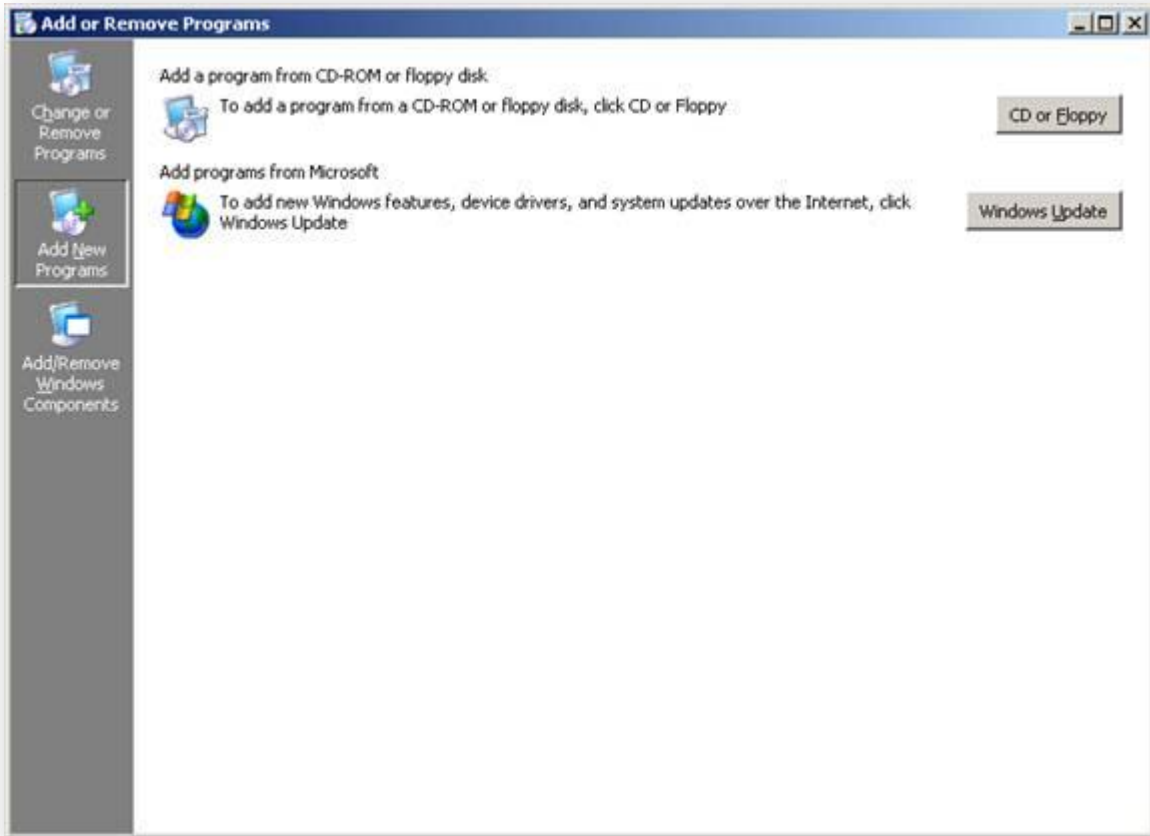
Figure 81 – Add Remove Programs

- When prompted to insert a program disk, click **Next** then **Browse**.

Figure 82 – Start Installation Program
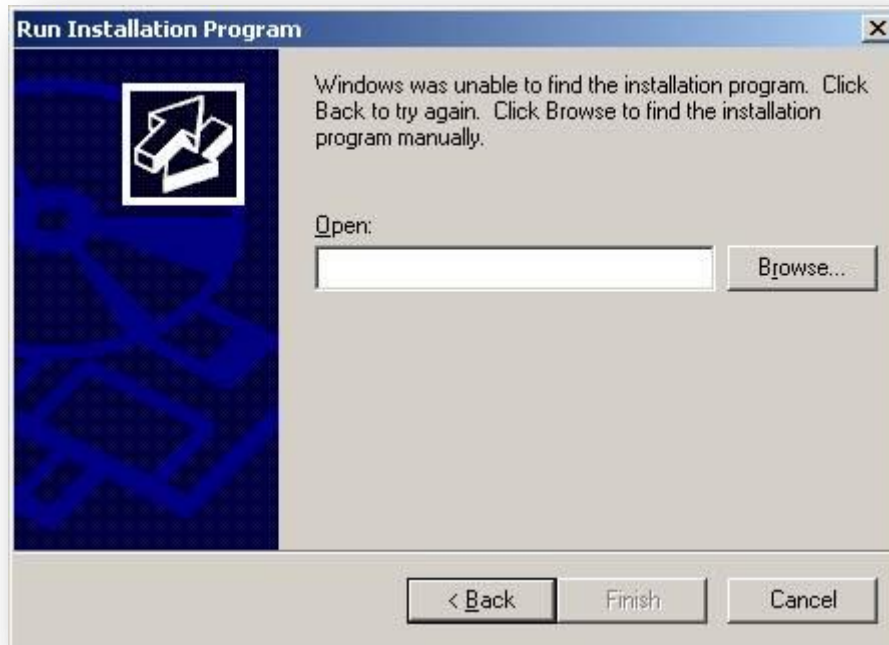
Figure 83 – Run Installation Program Dialog

- Locate the file **setup.exe** of the Zetadocs Client installer. This will be found in the ISSPrerequisite folder of the Zetadocs for NAV Client folder. Be sure to select the x86 or x64 version as appropriate. Select it and click the **Open** button.
- Path x86:
    - o D:\Zetadocs NAV Client\ISSetupPrerequisites\{FE8A4B83-A2F6-43AB-BC01-0301F92AF5E8}\Setup.exe
- Path x64:
    - o D:\Zetadocs NAV Client x64\ISSetupPrerequisites\{65D64B11-D27D-4F67-8C36-92BC6759EEF5}\Setup.exe
- On the **Run Installation Program** dialog box, click **Next**.
- If prompted with an **Open File – Security Warning** click **Run**.

Figure 84 – Security Warning

- Zetadocs client should install successfully. Please see chapter 6 for further details on the Zetadocs client install process.
- Click **Finish** to complete the installation.
- Click **Next** on the Windows **After Installation** dialog box. Then **Finish**.
- To verify the Zetadocs printer has installed correctly, browse to the **Printers and Faxes** folder, there should be a Zetadocs printer installed.

Note: If the installation of Zetadocs client has failed for some reason, please refer to the following Microsoft TechNet article:

http://www.microsoft.com/technet/prodtechnol/windowsserver2003/library/ServerHelp/447dad75-28f5-4e99-80f8-17ad2359ba66.mspx

- Publish Microsoft NAV for use with Zetadocs Client.
- On the Citrix server, run Citrix Access Management Console from **Start → All Programs → Citrix → Management Consoles.**
- Expand Citrix Resources | Presentation Server | < Citrix farm>
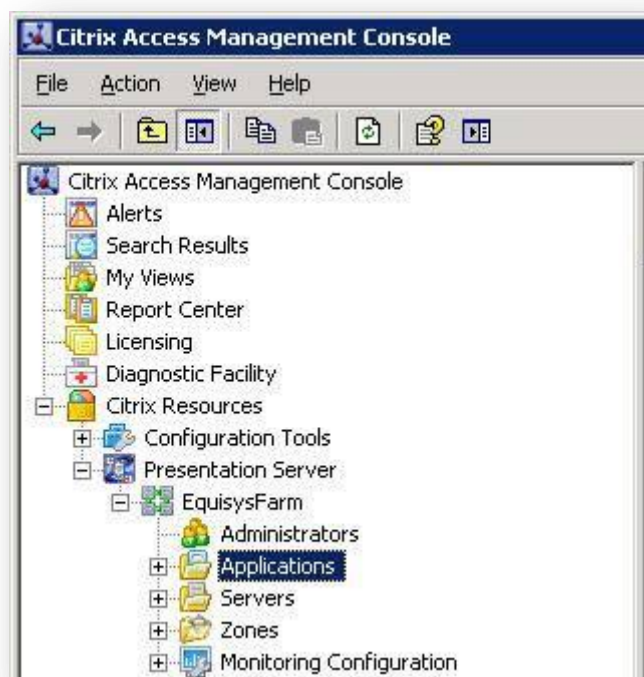
Figure 85 – Citrix Access Management Console

- Right click on Applications and select **New | Publish Application**.
- Give the published application a name and description. Click **Next**.
- Choose **Application** and **Access from server**. Click **Next**.
- You will now need to browse to your Microsoft NAV executable. The default path is C:\Program Files\Microsoft Dynamics NAV\CSIDE Client\fin.exe (or finsql.exe depending on whether you are running the SQL version), click **Next**.
- Choose a Citrix server which will publish the application, click **Next**.
- Enable the users and/or groups who can access the published application, click **Next**.
- Continue with the wizard enabling any features you wish to use. Click on **Finish** at the end.

Install Zetadocs NAV Client through Add/Remove programs
Now you must repeat the process used to install the Zetadocs for NAV Client.
- Start the **Add or Remove Programs** control panel applet.
- Click on **Add New Programs** then click on the **CD or Floppy**.
- Locate the file **Setup-All.exe/Setup-Capture.exe/Setup-Delivery.exe** as applicable to your version of the software required. This will be found in the Zetadocs NAV Client folder.
- Be sure to select the x86 or x64 version as appropriate. Select it and click the **Open** button.

- On the **Run Installation Program** dialog box, click **Next**.
- If prompted with an **Open File – Security Warning** click **Run**.
- Zetadocs for NAV Client should install successfully.
- Click **Finish** to complete the installation.
- Click **Next** on the Windows **After Installation** dialog box. Then **Finish**.

Complete the Installation by continuing from chapter 7

To complete your system setup please continue from chapter 7 the Zetadocs for NAV connector.

Test the Zetadocs Client from a Published Application

- Run Program Neighbourhood from **Start → Programs → Citrix → Citrix Access Clients → Program Neighbourhood.**
- Open **Microsoft NAV**. Create a sample document by printing from a report which has been modified for Zetadocs for NAV.
- Print your sample document to the **Zetadocs PDF printer**.
- Once the document has been successfully printed Zetadocs client will be started and the printed document will appear in the document explorer window.
- Send the document via email, hard copy or fax.

27.5 Installing Zetadocs for NAV using Group Policy

Those intending to roll out their system using Group Policy should first complete their Server install as per the steps in the main chapters in this guide. Once that is complete you should use the instructions in this section to roll out the system across your client machines.

.Net Framework

Zetadocs for NAV requires the .Net Framework version 3.0 on each client machine that it is installed on. Our solution is dependent on the .net framework version 3.0. This will be installed on most systems already if they are using Vista or Windows 7. For machines that it is not already rolled out on it can be installed using a number of methods which are documented by Microsoft here:
http://msdn.microsoft.com/en-us/library/aa480217.aspx

Zetadocs for NAV Prerequisites

Zetadocs for NAV requires a number of third party components to be installed for it to function correctly. These are:

- Microsoft Office 2003 Primary Interop Assemblies (only required if using office 2003)
- Microsoft Office 2007 Primary Interop Assemblies (only required if using office 2007)
- Microsoft Visual C++ 2008 Redistributable x86
- Microsoft Visual Studio 2005 Tools for Office Runtime

The MSI versions of these 3rd party files that can be used with group policy have been provided on your product CD in the following directory:

\<Zetadocs for NAV CD>\Group Policy\

To configure each of these components to install with group policy please follow the instructions below:

- Copy the files from the directory above into a shared network folder that everyone has full access to.
- Open the default domain policy in the **Group Policy Management Editor**.
- Go to Computer Configuration → Policies → Software Settings → Software Installation in the tree view on the left hand side.
- Right click on the Software Installation node and select **New →Package**.
- Browse to the shared network folder and **open the MSI file**.
- A dialog will appear asking which deployment method to use, select **Advanced**.
- The properties dialog will appear. Change the name to something suitable then go to the deployment tab.
- Ensure that the **Deployment type** is set to **Assigned**.
- Under deployment options ensure that the **Install this application at logon** option is checked. (If this checkbox is not enabled click on the **Assigned** radio box again)
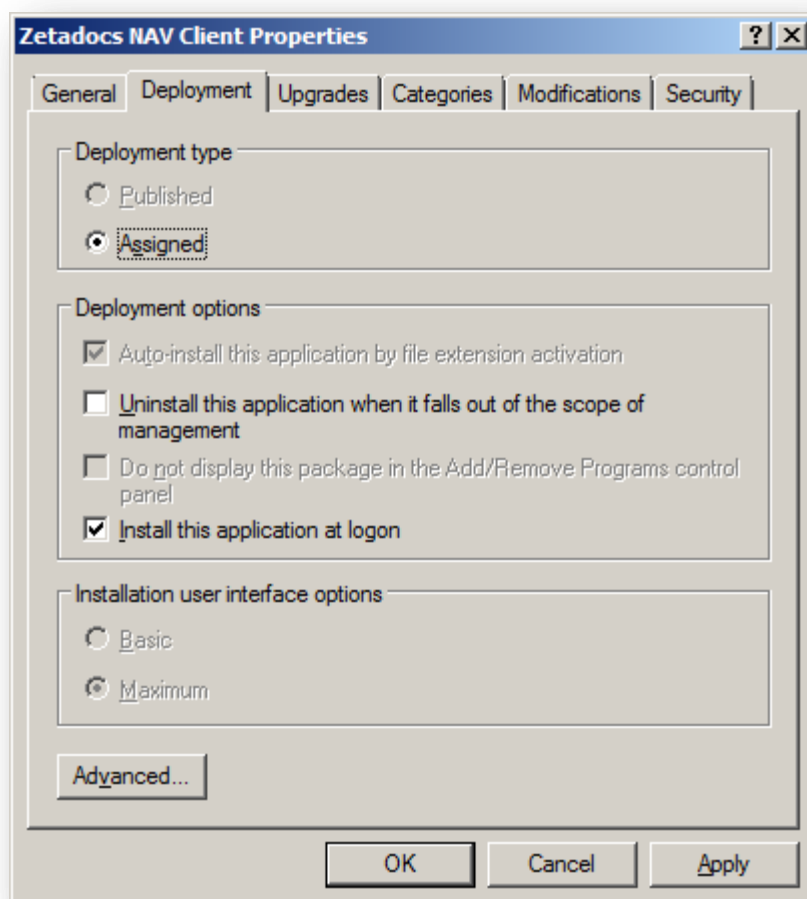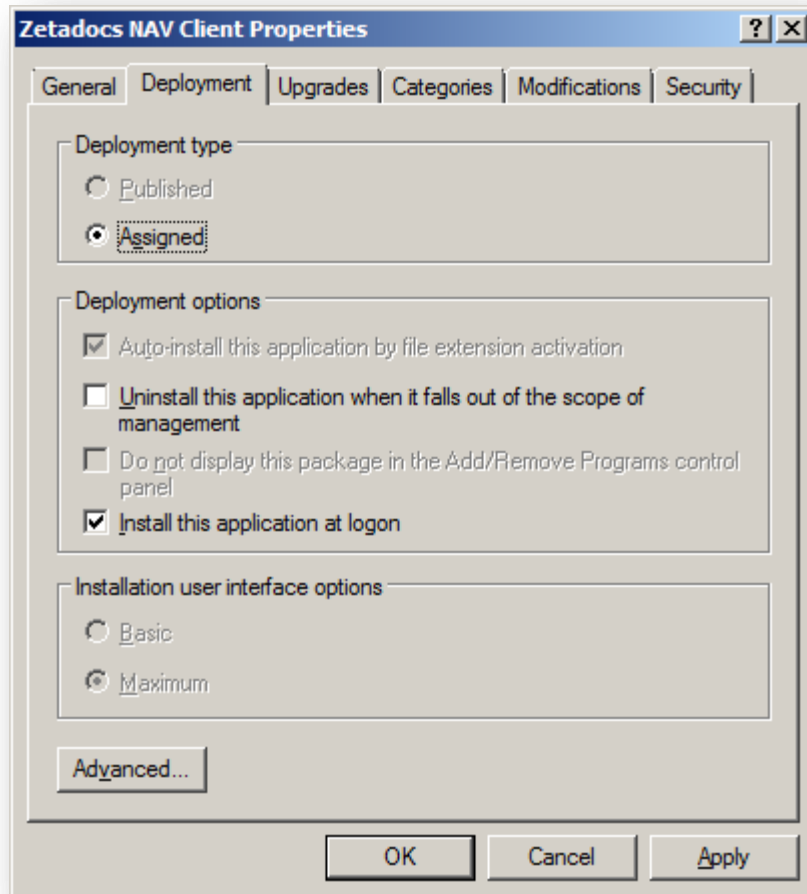
Figure 86 - Zetadocs NAV Client Properties

- Click **OK** to complete configuration.

Zetadocs for NAV Components

There are three components to Zetadocs for NAV which will need to be extracted in order to use them with group policy. The three components are:

Zetadocs PDF

The Zetadocs PDF installer is provided as a prerequisite of the Zetadocs for NAV client installer. The files can be found in the following locations:

- X86: <Zetadocs for NAV CD>\Zetadocs NAV Client\ISSetupPrerequisites\{FE8A4B83-A2F6-43AB-BC01-0301F92AF5E8}\Setup.exe
- X64: <Zetadocs for NAV CD>\Zetadocs NAV Client x64\ISSetupPrerequisites\{65D64B11-D27D-4F67-8C36-92BC6759EEF5}\Setup.exe

Depending on the computers on your network it is likely that you will have to configure both of these to install with group policy. To configure each installer to run with group policy please use the following steps:

- Using a command prompt run the setup exe with /a as the parameter. This runs the installer in administration mode and allows you to extract all of the files to the shared network folder.
- Open the **default domain policy** in the Group Policy Management Editor.
- Go to Computer Configuration → Policies → Software Settings → Software Installation in the tree view on the left hand side.
- Right click on the Software Installation node and select **New→Package**.
- Browse to the shared network folder and **open the MSI file**.
- A dialog will appear asking which deployment method to use, select **Advanced**.

- The properties dialog will appear. Change the name to something suitable then go to the deployment tab.
- Ensure that the **Deloyment type** is set to **Assigned**.
- Under deployment options ensure that the **Install this application at logon** option is checked. (If this checkbox is not enabled click on the Assigned radio box again)

Figure 87 - Zetadocs NAV Client Properties - Deployment

- For the **32 bit version** of the installer click on **Advanced**.
- Under Advanced deployment options uncheck the Make this 32 bit X86 application available to Win64 machines box.
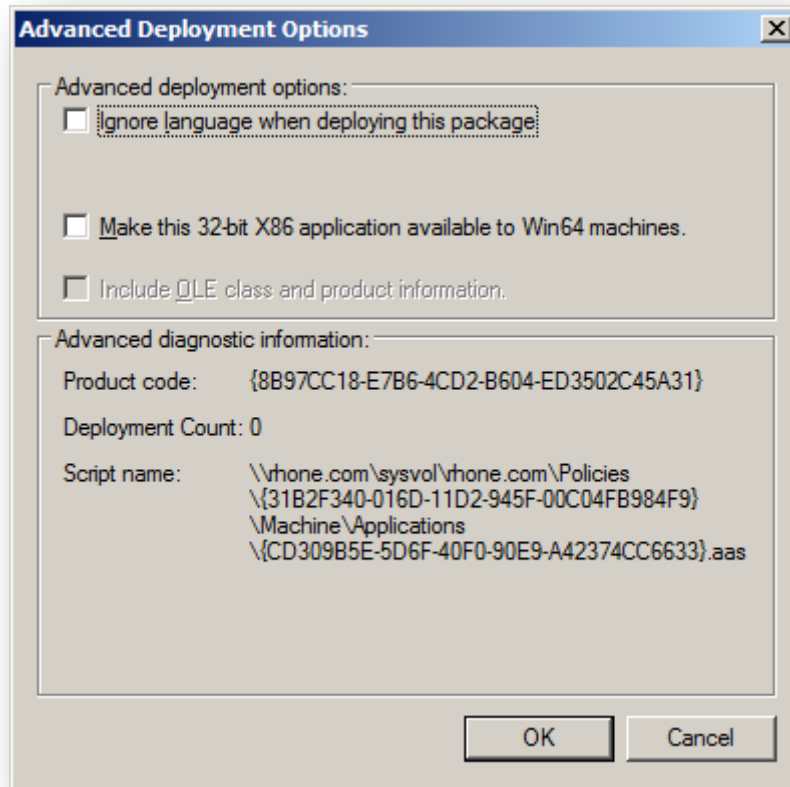
Figure 88 – Advanced Deployment Options

- Click **OK**.
- Then click **OK** again to complete the configuration.

Zetadocs API Runtime
The installer files for the Zetadocs API Runtime can be found in the following locations:
- X86: <Zetadocs for NAV CD>\Zetadocs NAV Client\ISSetupPrerequisites\{5212A720-C560-400F-A46B-36672060B4D2}\Zetadocs API Runtime.exe
- X64: <Zetadocs for NAV CD>\Zetadocs NAV Client x64\ISSetupPrerequisites\{637E8FC4-07F8-479E-A37C-C30C633F2EF2}\Zetadocs API Runting.exe

The instructions for configuring the Zetadocs API Runtime in group policy are the same as for Zetadocs PDF.

Zetadocs for NAV Client
The installer files for the Zetadocs for NAV Client can be found in the following locations:
- X86: <Zetadocs for NAV CD>\Zetadocs NAV Client_ZdNAVClientRun.exe
- X64: <Zetadocs for NAV CD>\Zetadocs NAV Client x64_ZdNAVClientRun.exe

The instructions for configuring the Zetadocs for NAV Client in group policy are also the same as for Zetadocs PDF.

Once configuration is complete the group policy management editor should look like the screenshot below:
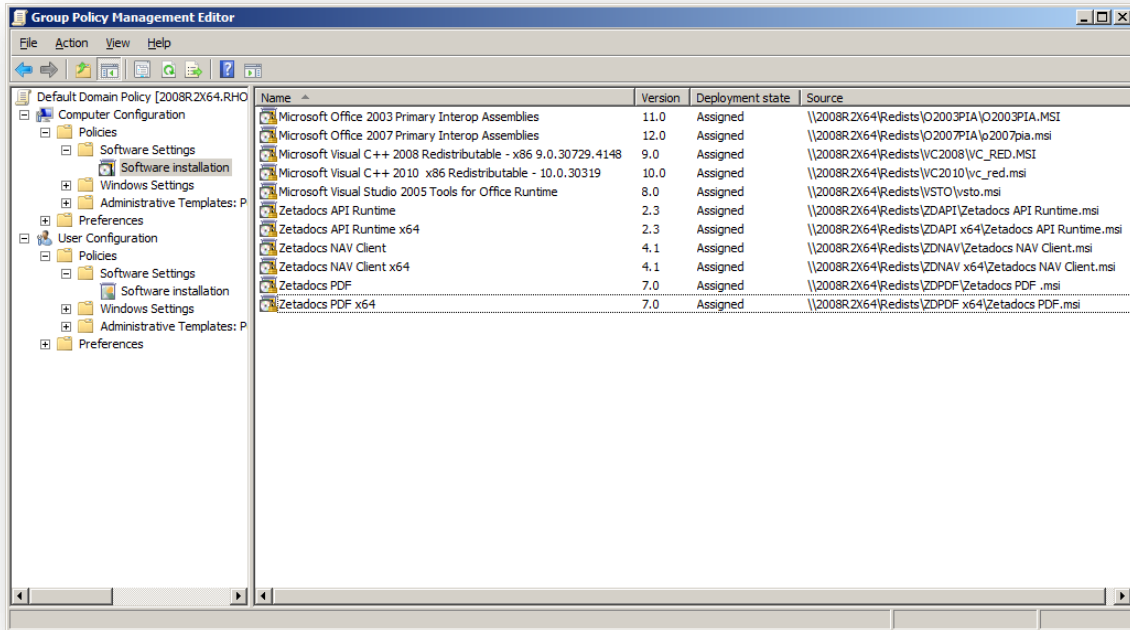
Figure 89 – Group Policy Management Editor

Permissions

The Zetadocs for NAV components require administrator privileges to install. To give these privileges please follow the steps below:

- Open the **Group Policy Management Editor** for the default domain policy.
- In the left hand tree view go to Computer Configuration→Policies→Administrative Templates→Windows Components→Windows Installer
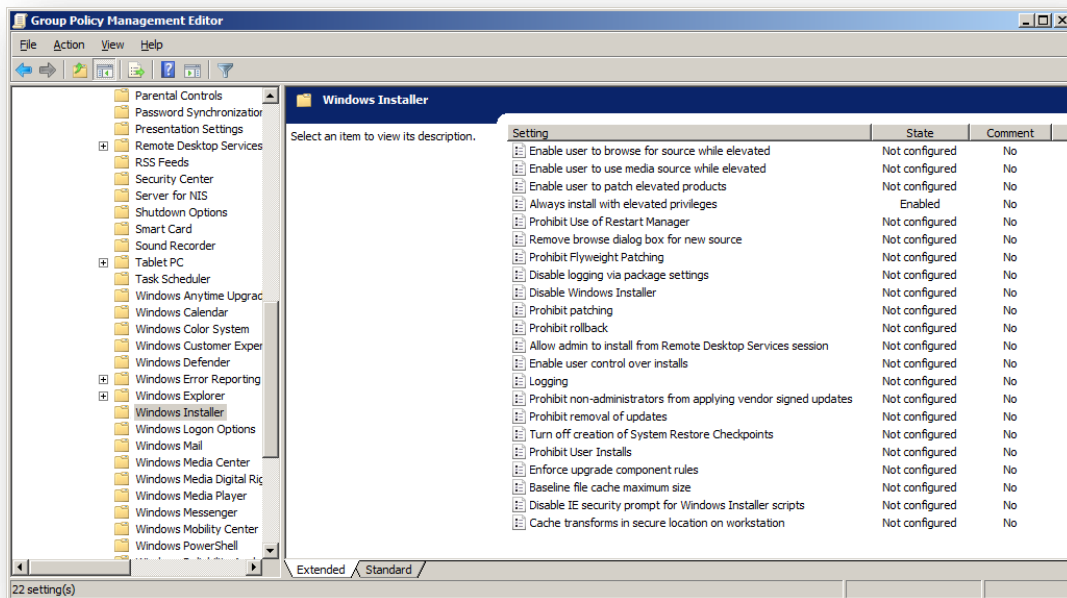

Figure 90 – Group Policy Management Editor – Windows Installer

- Edit the Always install with elevated privileges option.
- Change it to **Enabled** and click **OK**.
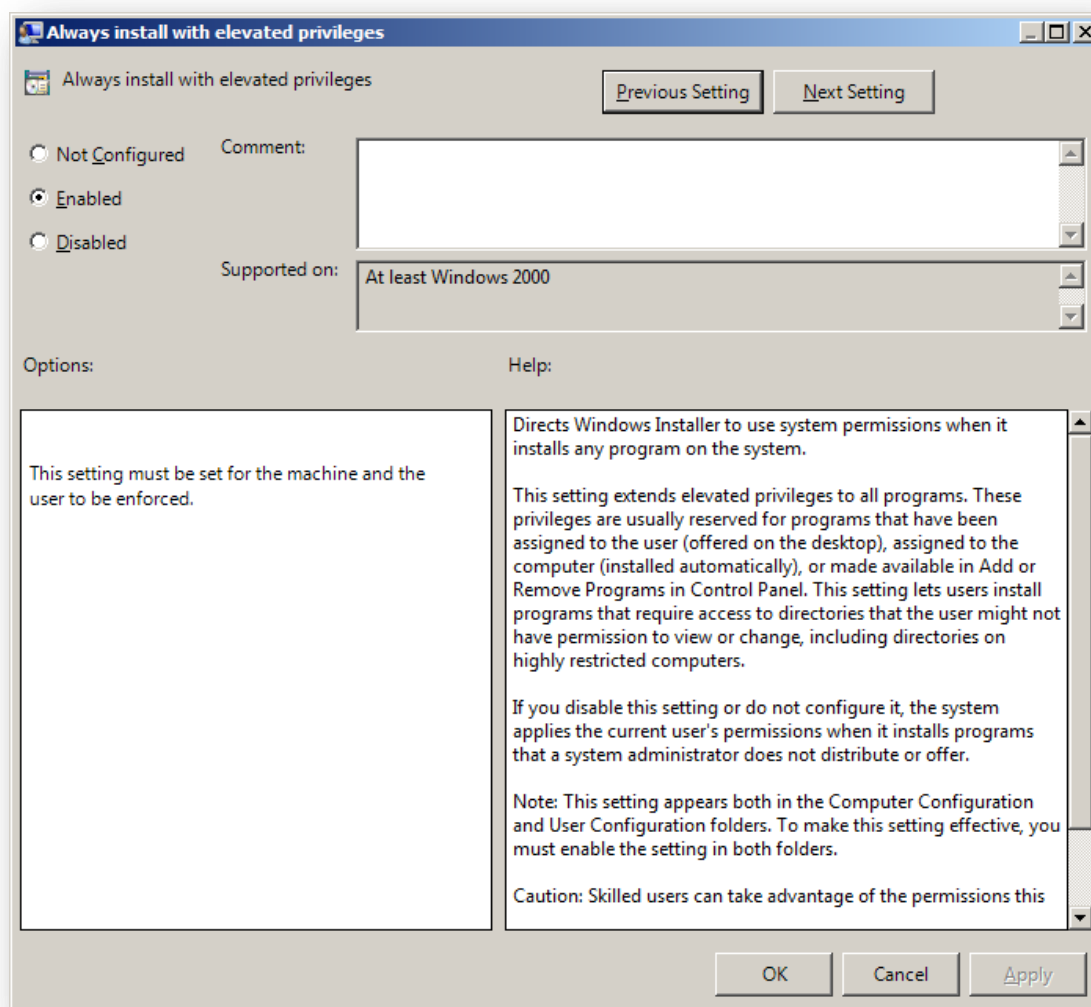
Figure 91 – Installing with Elevated Privileges

Zetadocs PDF Language Selection

The display language that the Zetadocs Client uses is stored in a registry key, so for non-English systems a change to the registry key will need to be rolled out in order to change the language.

Two files have been provided to assist in setting up this registry key change. The files can be found on your product CD here:

\<Zetadocs for NAV CD>\Group Policy\

To use the files provided please follow the instructions below:
- Open the group policy management editor for the default domain policy.
- Under Computer Configuration right-click Administrative Templates and select **Add/Remove Templates**.
- Click **Add** and find **ZetadocsPDF.adm** and **ZetadocsPDFx64.adm**.
- If you are using Windows Server 2003
  - Highlight **Administrative Templates** and select **View→Filtering**. Uncheck the **Only show policy settings that can be fully managed** option.
  - Under Administrative **Templates→ZetadocsPDF** you should now be able to see two Language settings. Set these to Enabled and select the language from the drop-down.
- If you are using Windows Server 2008
  - Under Administrative **Templates→Classic Administrative Templates→ZetadocsPDF** you should be able to see two language settings.

o   Edit each of the language settings, enable it and select the language from the drop down.

Upgrades

It is possible to perform upgrades using group policy. Each component will need to be upgraded separately by following these instructions:

- Open the **Group Policy Management Editor** for the default domain policy.
- Go to Computer Configuration→Policies→Software Settings→Software Installation
- Follow the instructions provided above to add the new package.
- View the **properties** of the new package and go to the **Upgrades** tab.
- In the **Packages that this package will upgrade** section, click the **Add** button and select the package to upgrade.
- Click **OK**.

27.6 Adding Capture Essentials Features to other NAV Objects

The Drag and Drop functionality is available on the Zetadocs Related Documents form which users access through the Zetadocs Archive option we have been adding to forms earlier in this guide. If you wish to add this functionality to a specific form directly instead of using the Related Documents form please follow the steps below.

Adding the General Capture Setup Form to the MenuSuite

- Open the **object designer** (Shift + F12) and select the Zetadocs for NAV Menusuite ID:55.
- Click the **Design** button.
- Browse to the Administration→Application Setup→Zetadocs Setup→Advanced Settings.
- Create a new menuitem under **Advanced Settings** by right clicking on the location in the Navigation pane and selecting **Create Item**.
- The Create Item window will appear enter the values below:
  - Object Type: Form
  - Object ID: 9010012
  - Caption: Zetadocs General Capture Setup
- The **CaptionML** field is only required for systems installed in languages other than English, select the alternate language as required and add a suitable translated caption.
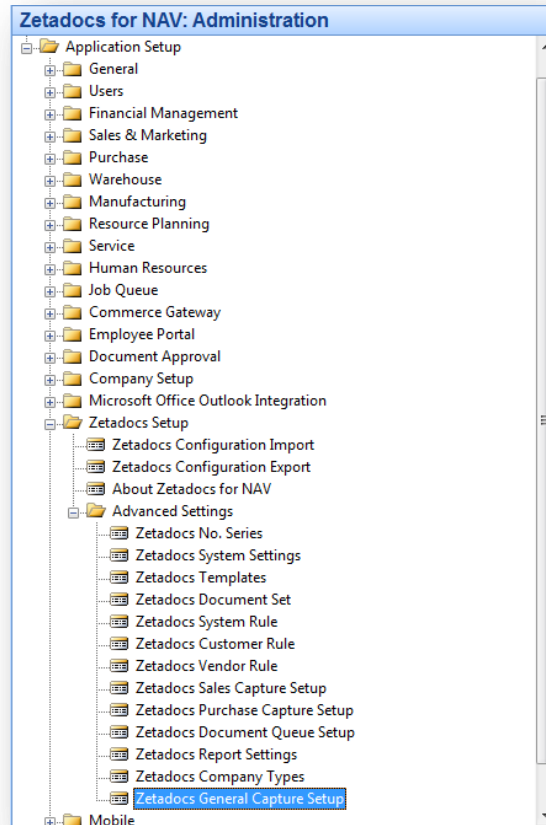- Click **OK** when you have finished.

- Next close the menusuite designer by right clicking on the area below the Administration link at the bottom of the Navigation pane.
- Select the **Close Navigation Pane Designer** option, you will be asked if you wish to save your changes to the menusuite, click **Yes** to save your changes.
- Now go to the same location, run the **Zetadocs General Capture Setup Form**.
- It has the following options, complete these as required.

Fields:
Archive Library: Only specify the SharePoint document library name, not the full URL.
Folder Name Structure: Subdivides archived documents into subfolders of the SharePoint document library based on information from the linked record.
> **COMPANY** – The "ORGANIZATION" metadata value.
> **DATE** – The Date with a format specified by the "Date Folder Naming" property.
> **DOCTYPE** – Adds "Document Queue" to the folder structure.

Date Folder Naming: Allows you to specify the format of the date folder structure in the SharePoint archive. E.g. YYYY-MM-DD, DD-MM-YYYY, MM-DD-YYYY etc.

27.7 Adding Capture Essentials Features to Forms
To add Capture Essentials to a specific form you first need to ensure that the Zetadocs Archive ID has been added to the table relevant to that form, see chapter 8 for details on doing this. To adjust the form you need to do the following.

- Open the **object designer** (Shift + F12) and select the form that needs to be modified and click the **Design** button.
- When the Design view opens select **View→CA/L Globals**.
- Create a global variable with the characteristics:
  - Name: RecRef

- o   Type: RecordRef
- Select the **Functions** tab and then create a global function
    - o   Name: SetRecordID
- Click **View→C/AL Code** or press F9 to open the C/AL Editor, scroll down the list until you reach the SetRecordID section.
- Add the following code:
- RecRef.GETTABLE(Rec);
    CurrForm.DragAndDropSubForm.FORM.SetRecordID(RecRef.RECORDID);
- Create a subform from the toolbox and place above the buttons making it the width of the items grid.
- Select the Properties for the new subform and give it the following properties:
    - o   Name: DragAndDropSubForm
    - o   HorzGlue: Both
    - o   VertGlue: Bottom
    - o   Border: No
    - o   SubFormID: Zetadocs Drag and Drop Subform (ID:9010010)
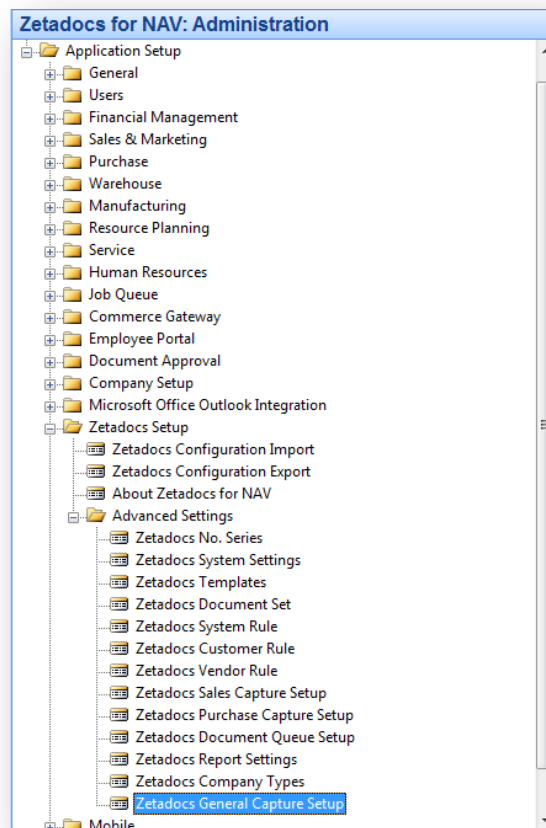
Figure 93 - Zetadocs Drag and Drop in the classic client

- Select the main form again and click **View→C/AL Code** or press F9 to open the C/AL Editor.
- Next copy the following code into the bottom of both the OnAfterGetRecord and OnNewRecord triggers of the form:
    - o   SetRecordID;
- Note that to enable the drag and drop control, focus is taken from the default field on opening of the form. If you wish to have the focus restored to the standard starting point for the user, add the following code to the bottom of the OnOpenForm trigger.
- CurrForm.<controlname>.ACTIVATE;
- (E.G. CurrForm."No.".ACTIVATE;)
- You can now drag and drop documents onto this form, repeat this process for any remaining forms you wish to add the Zetadocs Capture Essentials Drag and Drop control to.

27.8 Adding Capture Essentials Features to pages in the Role Tailored Client

- Open the **object designer** (Shift + F12) and select the page that needs to be modified and click the **Design** button, in this example we will be looking at the Employee card.
- Add the following entry inside the <Control1900000001> section:
  - o Name: Zetadocs
  - o Caption: <Zetadocs>
  - o Type: Part
- The Zetadocs Related Documents Grid will appear in this location, as such you can choose where you wish to display it. You can enter the line between, on top of, or at the bottom of the other controls.
- For example, putting the line on top of Control1 will place the related documents list at the top of the Employee Card page in the RTC.
- Place the Zetadocs line in a suitable location, if unsure view the page and find the entry below which you wish it to appear and place it there.
- Once you've added the line select it and open the properties (shift+F4) for it.
- Scroll down to the PagePartID field and select **Zetadocs Related Docs List**, ID:9010003.
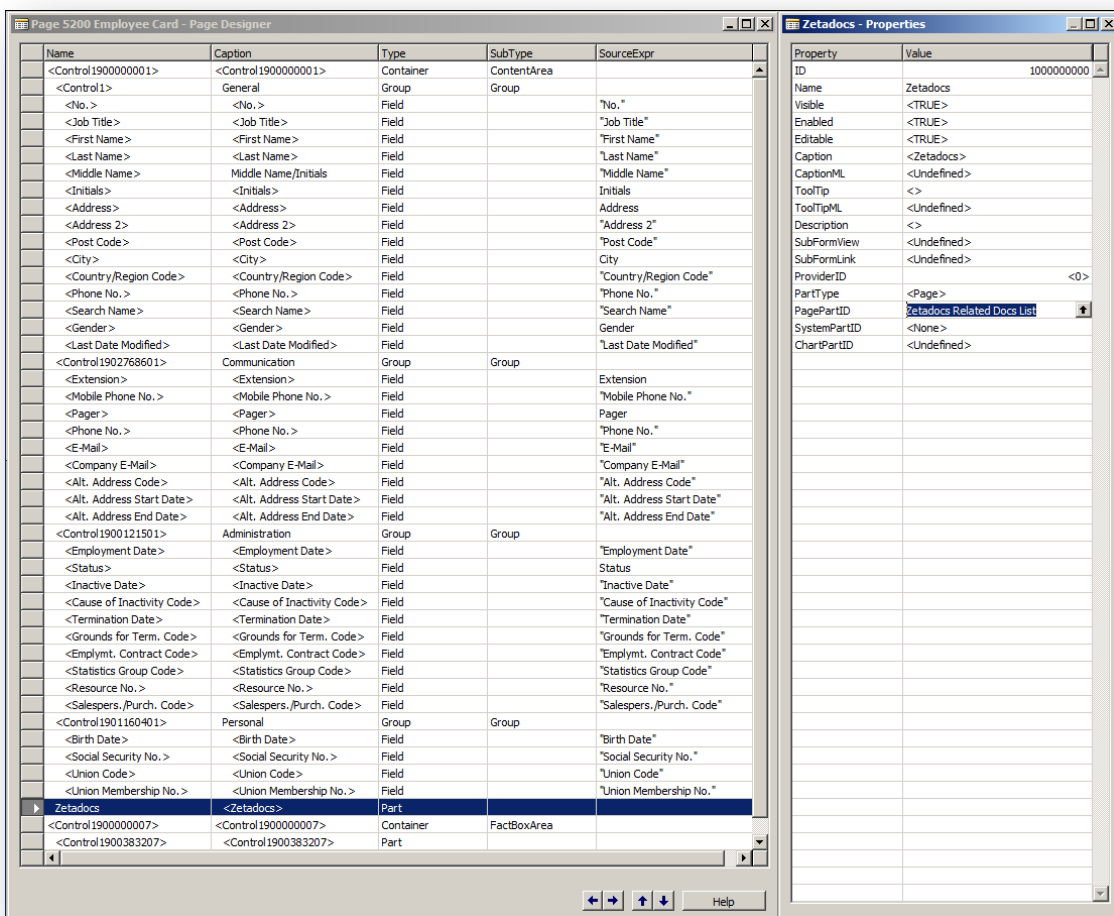
Figure 94 - Zetadocs line addition

- Select **View→CA/L Globals** and select the Variable tab, create a new global variable with the values:
  - o Name: RecRef
  - o Type: RecordRef
- Click **View→C/AL Code** or press F9 to open the C/AL Editor , scroll down to the OnAfterGetRecord section and enter the following:

```
RecRef.GETTABLE(Rec);
CurrPage.Zetadocs.FORM.SetRecordID(RecRef.RECORDID);
```

- The related document list can now be used in the Role Tailored Client.

Figure 95 - Zetadocs Drag and Drop in the classic client